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TEXTILE AND CLOTHING INQUIRY

Report to the Minister
of Industry, Trade
and Commerce

June 30, 1980/Vol. 2

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Textile and
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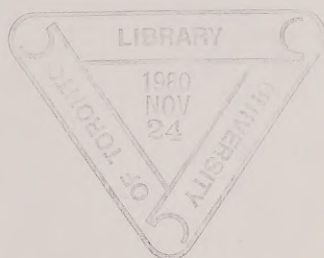


Government
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Clothing Board

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INQUIRY ON TEXTILES AND CLOTHING

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INTRODUCTION

Volume II contains details for the textile and clothing items subject to restraint, including work gloves and handbags. These details include sector profiles, apparent Canadian market tables and import tables by source.

Domestic shipment figures for textiles, household products and miscellaneous products were developed by the Textile and Consumer Products Branch, Department of Industry, Trade and Commerce, except for those data relating to handbags, which were developed by Kennedy, Ross and Associates.

Import figures for textiles were developed from Statistics Canada data by the Textile and Clothing Board in cooperation with the Textile and Consumer Products Branch, Department of Industry, Trade and Commerce.

Export figures for textiles were developed by the Textile and Consumer Products Branch, Department of Industry, Trade and Commerce.

Domestic shipment figures for clothing for the years 1975 to 1977 were prepared by the Textile and Clothing Board in cooperation with Statistics Canada. The 1978 and 1979 domestic shipment figures are based on a survey conducted by the Board. The survey shipments were projected utilizing a formula developed by Statistics Canada.

Import figures for clothing were developed by the Textile and Consumer Products Branch, Department of Industry, Trade and Commerce.

The export figures for clothing were developed by the Textile and Clothing Board.

The clothing tables should be read in conjunction with the explanatory notes referred to on page 269. The references in the explanatory notes correspond to the numerical references in the tables.

ALL TEXTILES SUBJECT TO RESTRAINT

DEFINITION

All textiles subject to restraint, i.e. sales yarns of cotton, polyester-cotton, acrylic, rayon, nylon, polyester and mixed fibres; broadwoven fabrics of cotton, polyester-cotton, nylon, polyester, wool (including woollen and worsted), rayon and acetate; mixed fibre fabrics; pile fabrics of man-made fibres; denim, corduroy and coated fabrics; warp-knit fabrics; towels and washcloths, sheets and pillowcases, hosiery, cordage, rope and twine, tablecloths, bedspreads, blankets and bedding, n.e.s.

INDUSTRY PROFILE

- Based on 1977 Statistics Canada data the textile industry, as defined above, was comprised of 944 establishments.
- Regionally speaking, the industry is primarily located in the Provinces of Québec (46 percent) and Ontario (40 percent).
- In 1979, total employment in the textile and knitting mills sector was 86,800 persons.
- In the period from 1976 to 1978, imports from 'low-cost' and state-trading sources accounted for an average of 27 percent of total imports.
- In 1979, Canadian shipments captured 69 percent of the sales yarn market, a decrease of 6 percentage points from 1978.
- In the woven fabrics market, Canadian shipments continue to supply an ever increasing share of the Canadian market, but accounted for only 45 percent of this market in 1979.

COTTON AND POLYESTER-COTTON YARNS

DEFINITION

Cotton yarns are spun yarns in which the cotton fibre content represents 50 percent or more by weight and polyester-cotton yarns are spun yarns in which polyester and cotton fibres in combination make up 100 percent of the weight.

SECTOR PROFILE

- There are three Canadian manufacturers of cotton yarns and polyester-cotton yarns, one of whom manufactures only cotton yarns. One company operates five plants while the other two are single plant operations. In total there are six plants producing cotton yarns and four producing polyester-cotton yarns.
- Only two plants are located in Ontario, with the remaining five plants located in Quebec.
- Total employment in this sector is estimated to have been 1,120 at the end of both 1978 and 1979.
- The domestic market for these yarns grew by only 4 percent in 1979, compared to an average annual growth of 13 percent from 1975 to 1978. However, it is believed that the average yarn count has increased toward finer yarns, so that more yarn is shipped per unit of weight.
- Domestic shipments decreased by 2 percent in 1979 as compared to 1978, due to the swing to finer yarn count.
- Imports increased by 17 percent in 1979 from 1978. On an individual country basis total imports from the United States rose by 72 percent, while imports of cotton yarns from the Arab Republic of Egypt almost tripled, from 782,000 kilos in 1978 to 2,225,000 kilos in 1979.

COTTON SPUN YARNS

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 kilos ---				
Domestic Shipments	12,417	13,512	13,700	12,042	11,025
Less Exports	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>
Net Domestic Shipments	12,417	13,512	13,700	12,042	11,025
Imports	<u>5,901</u>	<u>8,361</u>	<u>7,630</u>	<u>9,386</u>	<u>10,829</u>
Apparent Canadian Market	18,318	21,873	21,330	21,428	21,854
	--- percent ---				
Share of Market held by					
Net Domestic Shipments	68	62	64	56	50
Imports	32	38	36	44	50

COTTON SPUN YARNS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
--- '000 kilos ---					
<u>LOW-COST</u>					
Egypt	157	490	664	782	2,225
Brazil	670	2,120	2,371	3,148	1,401
Peru	-	85	2	388	876
Colombia	911	820	599	659	654
Argentina	-	-	119	279	124
Mexico	298	444	416	213	95
Hungary	148	265	166	131	87
El Salvador	94	44	29	144	66
China, P. R. of	6	17	15	37	39
India	-	1	-	-	15
Taiwan	-	-	-	-	8
Poland	3	-	-	-	1
Hong Kong	2	66	2	4	neg
Emirates, A. U.	-	-	-	5	-
Korea, R. of	10	3	1	1	-
Chile	-	-	-	2	-
Czechoslovakia	3	1	1	neg	-
U.S. Virgin Is.	-	-	-	neg	-
Philippines	-	-	1	-	-
Puerto Rico	5	-	-	-	-
Pakistan	neg	-	-	-	-
Korea, North	neg	-	-	-	-
Total Low-Cost	2,308	4,355	4,387	5,794	5,592
<u>DEVELOPED</u>					
U.S.A.	3,098	3,335	2,857	2,935	4,439
United Kingdom	194	243	171	161	78
France	37	45	60	85	45
Italy	15	29	7	11	12
Germany, West	10	29	9	4	9
Netherlands	2	43	22	1	5
Switzerland	3	6	2	4	3
Belgium-Lux.	3	2	1	-	2
Japan	139	62	41	20	neg
Austria	neg	-	neg	-	-
Denmark	neg	neg	neg	-	-
Sweden	neg	-	-	-	-
Total Developed	3,500	3,794	3,171	3,221	4,594

COTTON SPUN YARNS

IMPORTS (Continued)

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>OTHER</u>	--- '000 kilos ---				
Greece	neg	132	65	269	343
Israel	64	66	1	41	259
Spain	29	2	-	50	27
Portugal	neg	1	4	10	14
Yugoslavia	-	10	3	neg	-
Total Other	93	212	73	370	643
TOTAL, ALL SOURCES	5,901	8,361	7,630	9,386	10,829

Totals may not add due to rounding.

POLYESTER-COTTON SPUN YARNS

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 kilos ---				
Domestic Shipments	4,814	5,725	7,259	9,731	10,209
Less Exports	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>
Net Domestic Shipments	4,814	5,725	7,259	9,731	10,209
Imports	<u>996</u>	<u>1,085</u>	<u>1,446</u>	<u>2,211</u>	<u>2,759</u>
Apparent Canadian Market	5,810	6,810	8,705	11,942	12,968
Share of Market held by	--- percent ---				
Net Domestic Shipments	83	84	83	81	79
Imports	17	16	17	19	21

POLYESTER-COTTON SPUN YARNS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>	--- '000 kilos ---				
Korea, R. of	-	-	-	388	228
Taiwan	16	11	132	242	192
Brazil	-	-	2	44	15
Hong Kong	-	-	39	196	-
Mexico	-	-	20	146	-
Argentina	-	-	-	75	-
Chile	-	-	-	10	-
Colombia	-	-	-	9	-
Thailand	-	1	-	-	-
El Salvador	1	-	-	-	-
Singapore	-	-	neg	-	-
Total Low-Cost	17	12	192	1,109	435
<u>DEVELOPED</u>					
U.S.A.	941	957	1,148	961	2,271
Japan	36	27	10	29	5
United Kingdom	2	67	64	39	2
Ireland	neg	1	neg	-	neg
Netherlands	-	7	-	37	-
Italy	-	-	neg	7	-
Germany, West	-	6	16	-	-
Belgium-Lux.	-	7	14	-	-
France	-	-	neg	-	-
Total Developed	979	1,073	1,253	1,073	2,278
<u>OTHER</u>					
Israel	-	-	neg	17	45
Spain	-	-	-	12	-
Total Other	-	-	neg	29	45
TOTAL ALL SOURCES	996	1,085	1,446	2,211	2,759

Totals may not add due to rounding.

COTTON SPUN ACRYLIC YARNS

DEFINITION

All types of cotton system spun yarns containing 50 percent or more by weight of acrylic fibres.

SECTOR PROFILE

- There are four Canadian manufacturers of these products.
- Three of the plants are located in Quebec and one in Ontario.
- Total employment in this sector is estimated to have been 358 on December 31, 1979, a negligible increase from the 351 estimated to have been employed one year earlier.
- The domestic market for these yarns grew by 16 percent from 1978 to 1979. During that period, domestic shipments increased by 9 percent, while imports increased by 50 percent.
- Imports from the United States increased from 361 thousand kilos in 1978 to 1,086 thousand kilos in 1979, or 200 percent, and accounted for 73 percent of total imports of these yarns in 1979.
- Two of the four Canadian manufacturers of these products are planning major capital expenditures to expand their production capacity for these yarns.

COTTON SPUN ACRYLIC YARNS

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 kilos ---				
Domestic Shipments		4,429	4,906	4,920	5,364
Less Exports		<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>
Net Domestic Shipments		4,429	4,906	4,920	5,364
Imports	<u> </u>	<u>355</u>	<u>1,264</u>	<u>997</u>	<u>1,493</u>
Apparent Canadian Market	n/a	4,784	6,170	5,917	6,857

Share of Market held by	--- percent ---				
Net Domestic Shipments		93	80	83	78
Imports		7	20	17	22

COTTON SPUN ACRYLIC YARNS

IMPORTS

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
--- '000 kilos ---					
<u>LOW-COST</u>					
Taiwan		-	14	(351) ¹	(565) ¹
Philippines		-	neg	2	6
Korea, R. of		-	10	33	-
Brazil	<u> </u>	<u> </u>	<u>neg</u>	<u> </u>	<u> </u>
Total Low-Cost	-	-	24	35	6
<u>DEVELOPED</u>					
U.S.A.		72	500	361	1,086
Japan		16	701	488	388
Italy		8	3	2	6
Germany, West		-	neg	16	4
United Kingdom		260	neg	4	-
Ireland		1	neg	-	-
Belgium-Lux.		-	neg	neg	-
France	<u> </u>	<u>neg</u>	<u>24</u>	<u>1</u>	<u> </u>
Total Developed	-	357	1,229	872	1,485
<u>OTHER</u>					
Spain		-	11	90	2
Israel	<u> </u>	<u> </u>	<u>neg</u>	<u> </u>	<u> </u>
Total Other	-	-	11	90	2
 TOTAL ALL SOURCES	 -	 355	 1,264	 997	 1,493

* Not available.

¹ Transferred to worsted spun.

Totals may not add due to rounding.

WORSTED SPUN ACRYLIC YARNS

DEFINITION

All types of machine knitting and hand knitting acrylic yarns containing 50 percent or more by weight of acrylic fibres and spun on worsted or modified worsted systems.

SECTOR PROFILE

- There are nine Canadian manufacturers of these products.
- Seven of the nine plants are in Ontario and two in Quebec.
Four of the plants are located in the metropolitan Toronto area with the balance in small communities with the exception of one in Hamilton.
- Total employment in this sector was at 1,099 on December 31, 1979, an increase of 74 from a year earlier.
- Although the apparent Canadian market shows a 2 percent increase in 1979 over the 1978 level, excessive inventories at the end of 1977 are estimated to have been consumed in 1978, which is not reflected in the 1978 market table. As a result, the actual 1979 market declined by about 3 percent when compared to a 1978 market which takes account of that fact.
- Domestic shipments of these yarns decreased by 3 percent in 1979 compared to 1978, and machine knitting yarns declined by 8 percent. All Canadian mills reported below capacity operations and loss of orders to imports due to price competition.
- Imports of these yarns in 1979 were up by 13 percent over their 1978 levels.

WORSTED SPUN ACRYLIC YARNS

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 kilos ---				
Domestic Shipments	5,961	5,863	6,423	6,270	6,071
Less Exports	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>
Net Domestic Shipments	5,961	5,863	6,423	6,270	6,071
Imports	<u>2,806</u>	<u>2,836</u>	<u>3,822</u>	<u>2,965</u>	<u>3,362</u>
Apparent Canadian Market	8,767	8,699	10,245	9,235	9,433
Share of Market held by	--- percent ---				
Net Domestic Shipments	68	67	63	68	64
Imports	32	33	37	32	36

WORSTED SPUN ACRYLIC YARNS

IMPORTS

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>					
	--- '000 kilos ---				
Korea, R. of		870	1,856	965	1,085
Taiwan		44	22	396(351) ¹	602(565) ¹
Philippines		266	neg	22	21
Malaysia		-	20	83	13
Peru		-	-	neg	3
Mexico		-	-	-	neg
Hong Kong		-	-	-	-
Singapore		19	-	88	-
Brazil		45	neg	152	-
Total Low-Cost	-	1,244	1,899	1,707	1,725
<u>DEVELOPED</u>					
U.S.A.		346	303	377	717
Japan		836	1,077	452	400
France		129	123	137	175
Italy		neg	4	5	16
Germany, West		14	31	24	13
United Kingdom		44	126	6	10
Netherlands		16	6	14	6
Belgium-Lux.		2	14	15	5
Ireland		1	1	1	1
Switzerland		2	1	neg	1
New Zealand		-	-	neg	neg
Norway		-	-	neg	neg
South Africa		-	neg	-	-
Total Developed	-	1,390	1,686	1,032	1,345
<u>OTHER</u>					
Israel		neg	-	-	24
Greece		2	-	1	1
Spain		2	1	13	neg
Portugal		-	-	neg	neg
Total Other	-	5	1	15	25
TOTAL ALL SOURCES	-	2,639	3,586	2,753	3,096
Blends (50% or more acrylic)		198	237	212	267
TOTAL ALL SOURCES INCLUDING BLENDS		2,836	3,822	2,965	3,362

* Not available.

¹ Cotton spun, but substitutable for worsted spun

Totals may not add due to rounding.

RAYON, NYLON AND POLYESTER YARNS, MIXED AND BLENDED YARNS AND THREAD N.E.S.

DEFINITION

Rayon, nylon and polyester yarns are spun or filament yarns in which any or all of the rayon, nylon, or polyester fibres (except for polyester-cotton blends) in combination represents 50 percent or more by weight. Mixed and blended yarns and thread n.e.s. are spun or filament yarns containing a mixture of textile fibres or filaments where no one fibre represents 50 percent or more by weight.

SECTOR PROFILE

- There are eighteen companies producing these products in twenty four Canadian plants.
- Ten plants are located in Ontario and fourteen in Quebec.
- As most of the manufacturing of these products is carried out in multi-product plants, employment directly and solely related to these products is not available. The Textile and Consumer Products Branch of the Department of Industry, Trade and Commerce estimates that in 1979 there were:
 - 3,524 employed in the manufacture of filament yarns
 - 1,300 employed in the manufacture of spun yarns.
- The domestic market for these items grew by 17 percent in 1979 over 1978. Imports increased their share of the market to 29 percent from 22 percent, while the market share held by domestic manufacturers declined from 78 percent in 1978 to 71 percent in 1979.
- Domestic shipments increased by 7 percent in 1979 over 1978.
- Imports increased by 52 percent in 1979 over 1978, and are dominated by those yarns imported from the United States.

RAYON, NYLON AND POLYESTER YARNS,
MIXED AND BLENDED YARNS AND THREAD, N.E.S.

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 kilos ---				
Domestic Shipments	81,180	75,102	88,819	96,712	103,348
Less Exports	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>
Net Domestic Shipments	81,180	75,102	88,819	96,712	103,348
Imports	<u>28,369</u>	<u>28,105</u>	<u>25,344</u>	<u>27,751</u>	<u>42,254</u>
Apparent Canadian Market	109,549	103,207	114,163	124,463	145,602
	--- percent ---				
Share of Market held by					
Net Domestic Shipments	74	73	78	78	71
Imports	26	27	22	22	29

RAYON, NYLON AND POLYESTER YARNS,
MIXED AND BLENDED YARNS AND THREAD, N.E.S.

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>	--- '000 kilos ---				
Taiwan	-	74	54	68	11
Hong Kong	-	neg	-	1	2
Korea, R. of	2	-	neg	-	neg
Singapore	-	-	-	5	-
Philippines	-	-	-	4	-
Mexico	-	1	5	neg	-
Czechoslovakia	<u>3</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Low-Cost	5	75	59	78	14
<u>DEVELOPED</u>					
U.S.A.	2,283	1,188	1,554	1,606	2,108
Japan	327	238	169	120	199
United Kingdom	79	28	23	110	151
Italy	11	15	10	40	73
Belgium-Lux.	134	66	49	57	22
France	32	6	10	9	22
Germany, West	34	50	17	10	18
Ireland	neg	3	2	3	3
Netherlands	7	3	neg	2	1
Switzerland	neg	neg	neg	1	neg
Sweden	neg	-	-	neg	neg
Denmark	neg	neg	neg	neg	-
Norway	<u>-</u>	<u>-</u>	<u>-</u>	<u>neg</u>	<u>-</u>
Total Developed	2,908	1,598	1,835	1,959	2,597
<u>OTHER</u>					
Spain	-	-	-	5	8
Israel	-	-	-	3	6
Greece	neg	-	-	-	1
Portugal	<u>-</u>	<u>-</u>	<u>-</u>	<u>neg</u>	<u>-</u>
Total Other	neg	-	-	9	15
TOTAL ALL SOURCES	2,913	1,673	1,894	2,046	2,626

RAYON FILAMENT YARNS

INDEX⁽¹⁾
1975 = 100

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
Domestic Shipments	100	61	71	86	96
Less Exports	100	56	153	219	238
Net Domestic Shipments	100	62	55	60	68
Imports	100	209	127	143	146
Apparent Canadian Market	100	89	69	76	83
Share of Market held by					
Net Domestic Shipments	100	69	80	79	83
Imports	100	232	184	189	174

(1) Indexed to retain confidentiality

RAYON YARNS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>	--- '000 kilos ---				
Brazil	68	14	37	72	49
Korea, R. of	-	34	7	20	28
Mexico	68	68	57	45	9
Taiwan	71	111	90	14	5
Czechoslovakia	2	-	1	-	-
Argentina	-	-	-	neg	-
Romania	-	3	-	-	-
India	neg	-	-	-	-
Colombia	5	5	-	-	-
Pakistan	<u>neg</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Low-Cost	215	235	191	151	91
<u>DEVELOPED</u>					
U.S.A.	1,474	3,880	2,154	2,340	2,444
United Kingdom	324	302	258	241	303
Netherlands	93	49	38	139	261
Japan	69	194	147	221	103
Germany, West	57	59	50	104	78
France	10	4	8	17	9
Austria	-	-	-	neg	6
Italy	7	1	1	1	5
Belgium-Lux.	neg	5	34	10	neg
Switzerland	11	2	1	neg	-
Ireland	<u>3</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Developed	2,048	4,494	2,691	3,074	3,209
<u>OTHER</u>					
Spain	7	-	5	11	12
Yugoslavia	<u>-</u>	<u>11</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Other	7	11	5	11	12
TOTAL ALL SOURCES	2,269	4,740	2,887	3,236	3,312
Of which, estimated Rayon Filament Yarns	2,269	4,740	2,887	3,236	3,312

Totals may not add due to rounding.

NYLON FILAMENT YARNS

INDEX⁽¹⁾
1975 = 100

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
Domestic Shipments	100	98	112	127	138
Less Exports	100	132	233	376	328
Net Domestic Shipments	100	97	108	119	132
Imports	100	101	104	82	141
Apparent Canadian Market	100	98	107	110	134
Share of Market held by					
Net Domestic Shipments	100	99	101	108	99
Imports	100	104	96	76	104

(1) Indexed to retain confidentiality

NYLON YARNS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>			--- '000 kilos ---		
Taiwan	15	15	11	47	147
Korea, R. of	43	73	86	131	34
Puerto Rico	-	-	-	2	15
Panama	-	-	-	-	7
Brazil	-	-	-	-	neg
Malta	4	64	5	-	-
Mexico	-	-	-	neg	-
Total Low-Cost	63	152	102	181	203
<u>DEVELOPED</u>					
U.S.A.	10,968	10,405	10,738	8,869	15,399
Japan	86	140	547	36	958
Italy	645	652	663	664	772
United Kingdom	401	556	792	644	708
Ireland	92	364	72	347	614
France	183	264	357	100	154
Germany, West	466	541	232	20	73
Switzerland	153	80	163	105	30
Austria	65	27	29	10	29
Finland	215	138	77	neg	neg
Netherlands	48	153	47	2	neg
Belgium-Lux.	-	neg	13	-	-
Denmark	-	-	-	9	-
Sweden	2	-	-	-	-
South Africa	neg	-	-	-	-
Total Developed	13,325	13,319	13,729	10,807	18,739
<u>OTHER</u>					
Greece	-	-	-	28	41
Israel	38	160	210	36	17
Spain	88	20	13	43	5
Portugal	-	-	3	-	-
Yugoslavia	-	6	-	-	-
Total Other	126	186	227	107	64
TOTAL ALL SOURCES	13,515	13,656	14,057	11,094	19,005
of which, estimated Nylon Filament Yarns	11,487	11,608	11,949	9,430	16,154

Totals may not add due to rounding.

POLYESTER FILAMENT YARNS

INDEX⁽¹⁾
1975 = 100

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
Domestic Shipments	100	87	106	103	98
Less Exports	100	14	11	152	70
Net Domestic Shipments	100	89	109	102	99
Imports	100	83	67	118	179
Apparent Canadian Market	100	88	98	106	119
Share of Market held by					
Net Domestic Shipments	100	101	111	96	83
Imports	100	96	68	112	152

(1) Indexed to retain confidentiality

POLYESTER YARNS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>	--- '000 kilos ---				
Taiwan	188	246	77	68	24
Hong Kong	10	86	5	59	11
Thailand	-	-	-	-	1
Singapore	-	neg	12	18	-
Korea, R. of	-	-	3	12	-
Chile	-	-	-	2	-
Costa Rica	-	-	-	neg	-
China, P. R. of	-	neg	-	-	-
Puerto Rico	-	11	-	-	-
Total Low-Cost	198	344	96	159	36
<u>DEVELOPED</u>					
U.S.A.	3,611	4,537	4,067	9,304	15,944
Italy	105	92	140	551	524
Germany, West	1,480	753	665	345	245
United Kingdom	161	66	997	249	218
Japan	348	538	467	531	200
Switzerland	2,455	1,409	37	5	22
France	745	117	30	17	7
Ireland	neg	-	-	-	neg
Austria	328	149	1	4	neg
Netherlands	1	7	neg	neg	neg
Belgium-Lux.	6	20	3	4	-
Denmark	162	-	neg	-	-
South Africa	-	-	-	neg	-
Norway	neg	neg	-	-	-
Sweden	neg	-	-	-	-
Total Developed	9,401	7,689	6,407	11,010	17,161
<u>OTHER</u>					
Spain	15	3	-	177	113
Greece	-	-	neg	19	-
Israel	58	neg	3	10	-
Total Other	72	4	3	205	113
TOTAL ALL SOURCES	9,672	8,036	6,506	11,375	17,311
Of which, estimated Polyester Filament Yarns	8,705	7,232	5,856	10,238	15,580

Totals may not add due to rounding. 24

POLYESTER FABRICS

DEFINITION

Polyester fabrics are those fabrics in which the warp is composed of polyester filament yarns.

SECTOR PROFILE

- There are seven firms manufacturing polyester filament fabrics in Canada.
- Six plants are located in Québec and four in Ontario. Approximately 90 percent of domestic production of these fabrics comes from three firms.
- Employment in this sector in 1979 was at about the same level as in 1978, i.e., 900.
- The polyester fabric market has shown the most rapid growth among all fibres since 1974, growing by 84 percent to a level of 96,878,000 square metres in 1979.
- Domestic shipments increased by 43 percent in 1979 over 1978 and market share held by domestic manufacturers increased from 38.1 percent to 47.4 percent over the same period.
- Imports in 1979 held at almost the same level as in 1978.

POLYESTER FABRICS

INDEX⁽¹⁾
1975 = 100

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
Domestic Shipments	100	130	137	193	271
Less Exports	100	362	33	55	147
Net Domestic Shipments	100	122	140	198	276
Imports	100	133	132	118	119
Apparent Canadian Market	100	130	134	139	160
Share of Market held by					
Net Domestic Shipments	100	92	104	142	173
Imports	100	103	99	85	74

(1) Indexed to retain confidentiality

POLYESTER FABRICS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>	--- '000 kilos ---				
Korea, R. of	413	298	254	298	158
Poland	21	30	38	44	50
Thailand	-	1	2	37	40
Indonesia	-	-	-	8	29
Taiwan	44	49	86	21	24
Hong Kong	435	76	181	1	18
Brazil	9	7	-	1	9
Singapore	-	29	1	1	6
India	-	-	-	-	2
Czechoslovakia	neg	6	3	26	-
Germany, East	-	neg	-	-	-
Kuwait	-	neg	-	-	-
Malaysia	-	-	5	23	-
China, P. R. of	-	1	1	-	-
Philippines	-	5	-	-	-
Bahamas	-	-	-	neg	-
El Salvador	9	4	-	4	-
Trinidad & Tobago	-	-	1	-	-
Panama	-	-	1	-	-
Total Low-Cost	932	508	574	466	336
<u>DEVELOPED</u>					
U.S.A.	1,502	2,421	2,512	2,856	3,671
Japan	1,907	2,186	1,923	1,956	1,392
Italy	132	230	349	626	635
France	259	386	474	409	395
Ireland	neg	-	-	-	92
Germany, West	107	115	108	107	78
Switzerland	73	128	90	59	55
Austria	8	10	12	13	15
United Kingdom	10	56	22	43	12
Belgium-Lux.	neg	2	5	3	4
Norway	neg	-	neg	-	4
Netherlands	2	14	8	10	4
Sweden	7	20	15	11	3
Finland	2	neg	neg	1	3
Denmark	neg	1	neg	6	1
South Africa	-	-	1	-	-
Australia	neg	-	neg	-	-
Total Developed	4,011	5,569	5,520	6,100	6,363

POLYESTER FABRICS

IMPORTS (Continued)

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>OTHER</u>	--- '000 kilos ---				
Portugal	1	1	neg	5	120
Spain	128	176	120	142	96
Greece	neg	-	-	2	-
Israel	<u>neg</u>	<u>1</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Other	130	178	120	149	216
TOTAL ALL SOURCES	5,072	6,254	6,214	6,716	6,916

Totals may not add due to rounding.

COTTON, POLYESTER-COTTON, CORDUROY AND DENIM FABRICS

DEFINITION

There are four basic product groupings within the cotton and polyester-cotton fabrics classification.

- 1) 100 percent cotton
- 2) polyester-cotton
- 3) denim
- 4) corduroy (cotton and polyester-cotton)

Polyester-cotton fabrics are those fabrics which are produced from spun polyester-cotton fibre yarns in which the combined content of polyester and cotton fibres make up 100 percent of the fabrics.

SECTOR PROFILE

- The cotton and polyester-cotton fabrics industry consists of two large companies and three converters. Two of the converters specialize in finishing corduroy and the third finishes huck towelling for industrial use.
- The five manufacturers of these fabrics operate sixteen plants, twelve of which are in Québec, three in Ontario, and one in New Brunswick.
- Employment in the manufacture of cotton and polyester-cotton fabrics is estimated to have been 8,917 in 1979, up by about 4 percent from 8,590 in 1978.
- The market for these fabrics in Canada grew by 8 percent in 1979 over 1978.
- Domestic shipments increased by 10 percent in 1979 over the previous year.
- Imports increased by 7 percent in 1979 over the previous year, and account for 55 percent of the apparent Canadian market, almost the same share they held in 1978.

COTTON, POLYESTER-COTTON,
CORDUROY AND DENIM FABRICS

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 square meters ---				
Domestic Shipments		163,976	164,242	171,826	189,531
Less Exports		<u>28,926</u>	<u>26,186</u>	<u>24,276</u>	<u>27,319</u>
Net Domestic Shipments		135,050	138,056	147,550	162,212
Imports		<u>228,804</u>	<u>188,888</u>	<u>242,509</u>	<u>261,104</u>
Apparent Canadian Market	n/a	363,854	326,944	390,059	423,316

Share of Market held by	--- percent ---				
Net Domestic Shipments		37	42	38	38
Imports		63	58	62	62

COTTON, POLYESTER-COTTON,
CORDUROY AND DENIM FABRICS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>			--- '000 kilos ---		
China, P. R. of	1,872	3,970	2,418	3,844	6,786
Taiwan	537	992	896	3,320	1,761
Hong Kong	1,295	2,780	1,843	2,040	1,729
Pakistan	867	2,349	672	1,745	1,336
Colombia	1,045	1,821	790	1,216	1,259
Czechoslovakia	741	762	725	1,153	1,076
Malaysia	3	171	607	1,172	981
India	510	1,655	1,108	1,072	867
U.S.S.R.	864	1,224	1,160	2,209	848
Korea, R. of	345	583	474	733	748
Mexico	1,538	1,687	1,824	702	568
Romania	363	1,119	677	781	468
Brazil	794	1,138	469	374	425
Singapore	291	312	233	361	362
Thailand	188	679	913	484	349
Poland	936	1,201	781	242	280
Hungary	48	317	289	309	280
Peru	-	23	67	90	218
Indonesia	neg	-	neg	1	159
Guatemala	223	289	130	72	117
Philippines	26	59	93	70	30
Cuba	-	-	-	-	21
Ethiopia	-	-	-	-	neg
Kenya	-	-	neg	-	neg
St. Pierre et Miq.	-	-	-	neg	neg
Bulgaria	37	14	18	-	-
Iran	neg	-	-	-	-
Iraq	-	-	-	neg	-
Yemen, P.D.R.	neg	-	-	-	-
Sudan	-	-	neg	-	-
Turkey	neg	10	-	-	-
Egyptian, A.R.	-	neg	-	-	-
Argentina	-	-	43	44	-
Ecuador	-	-	1	-	-
Venezuela	62	135	8	-	-
Jamaica	-	-	-	13	-
El Salvador	neg	17	4	1	-
Haiti	5	34	-	-	-
Nicaragua	179	43	-	-	-
Puerto Rico	-	59	11	44	-
Ivory Coast	-	-	neg	-	-
Bermuda	-	-	neg	-	-
U.S. Virgin Is.	-	-	-	neg	-
Total Low-Cost	12,769	23,441	16,254	22,091	20,670

COTTON, POLYESTER-COTTON,
CORDUROY AND DENIM FABRICS

IMPORTS (Continued)

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 kilos ---				
U.S.A.	19,293	19,525	16,897	18,136	22,329
Japan	1,885	3,002	4,390	2,566	1,058
Germany, West	444	488	375	339	263
United Kingdom	208	291	232	299	198
Italy	67	161	112	174	152
Netherlands	156	247	147	139	122
Belgium-Lux.	22	21	19	34	121
France	93	108	50	235	73
Switzerland	69	67	70	68	54
Austria	16	27	55	39	43
Australia	2	-	neg	-	23
Sweden	21	39	17	44	20
Finland	13	21	20	17	12
Denmark	9	12	5	8	4
South Africa	-	-	neg	5	neg
Ireland	-	-	2	-	neg
Norway	-	-	neg	-	neg
New Zealand	-	-	-	neg	-
Total Developed	22,299	24,007	22,392	22,105	24,471
<u>OTHER</u>					
Portugal	60	73	97	176	177
Spain	33	10	23	16	97
Yugoslavia	13	46	27	13	56
Israel	26	19	17	19	6
Greece	<u>1</u>	<u>neg</u>	<u>neg</u>	<u>3</u>	<u>neg</u>
Total Other	133	149	164	226	336
TOTAL ALL SOURCES	35,202	47,598	38,810	44,423	45,481
Add Polyester-Cotton					
Corduroy					
CITC 377-59-40	n/a	n/a	n/a	632	905
CITC 377-59-50	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>956</u>	<u>1,874</u>
Total Cotton, Polyester-Cotton, Corduroy and Denim Fabrics	35,202	47,598	38,810	46,011	48,260

Totals may not add due to rounding.

WOOLLEN FABRICS

DEFINITION

In opposition to worsted fabrics which are made from fine combed yarns using virgin raw material, woollen fabrics are usually heavier and woven from coarser yarns which can be spun from virgin, regenerated or second grade wool, man-made and hair fibres and are used in a wide variety of blends.

SECTOR PROFILE

- There are six manufacturers of woollen fabrics in Canada, with the four largest regularly supplying about 95 percent of total industry shipments.
- Five of the six woollen fabric manufacturers are located in small centres in the province of Quebec and the other is located in Ontario.
- Employment in the manufacture of woollen fabrics in 1979 was 1,295, marginally higher than the 1,263 employed in 1978.
- The woollen fabrics market has almost doubled from 1975 to 1979. Most of this growth has been captured by imports, which accounted for 56 percent of the market in 1979.
- Domestic shipments in 1979 were virtually identical to 1978 shipments.
- Imports in 1979 were 32 percent higher than in 1978.

WOOL AND WOOL BLEND FABRICS
(EXCLUDING WORSTEDS)

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 square meters ---				
Domestic Shipments	10,575	11,562	12,495	12,679	12,894
Less Exports	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Net Domestic Shipments	10,575	11,562	12,495	12,679	12,894
Imports	<u>6,233</u>	<u>9,066</u>	<u>8,064</u>	<u>12,476</u>	<u>16,414</u>
Apparent Canadian Market	16,808	20,628	20,559	25,155	29,308

Share of Market held by	--- percent ---				
Net Domestic Shipments	63	56	61	50	44
Imports	37	44	39	50	56

WOOL AND WOOL BLEND FABRICS
(EXCLUDING WORSTEDS)

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>	--- '000 kilos ---				
Czechoslovakia	34	52	13	99	108
Uruguay	7	3	6	28	79
India	1	11	2	2	55
Poland	3	51	11	25	46
Argentina	-	neg	29	73	40
Brazil	26	6	neg	3	18
China, P. R. of	10	62	-	12	9
Mexico	14	5	14	9	4
Romania	neg	10	5	-	3
Hungary	-	3	-	-	3
Peru	-	-	-	neg	1
Hong Kong	-	-	2	-	1
Chile	1	7	6	1	neg
Colombia	3	13	22	neg	neg
Korea, R. of	9	32	20	58	-
Taiwan	-	5	-	neg	-
Germany, East	-	2	1	-	-
Malta	-	12	-	-	-
Total Low-Cost	108	274	132	311	367
<u>DEVELOPED</u>					
Italy	748	1,025	994	1,765	2,650
United Kingdom	689	924	939	961	1,081
U.S.A.	89	131	171	342	409
France	57	91	89	126	93
Germany, West	24	96	58	71	72
Ireland	39	48	50	31	44
Netherlands	29	45	34	30	31
Switzerland	4	13	7	9	15
Norway	19	18	18	12	11
Denmark	5	9	5	3	8
South Africa	neg	-	neg	5	6
Japan	60	46	2	56	4
Australia	neg	neg	2	6	4
Belgium-Lux.	1	13	2	3	1
Austria	neg	1	1	1	1
Sweden	neg	2	1	2	1
Iceland	neg	-	-	2	neg
New Zealand	neg	-	-	neg	neg
Total Developed	1,765	2,462	2,375	3,423	4,431

WOOL AND WOOL BLEND FABRICS
(EXCLUDING WORSTEDS)

IMPORTS (Continued)

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>OTHER</u>	--- '000 kilos ---				
Spain	107	91	51	54	53
Portugal	2	2	neg	4	48
Yugoslavia	-	-	3	1	1
Israel	-	neg	neg	-	-
Greece	<u>neg</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Other	109	94	55	59	,102
TOTAL ALL SOURCES	1,982	2,829	2,561	3,793	4,900

Totals may not add due to rounding.

WORSTED FABRICS

DEFINITION

Worsted fabrics are woven fabrics having 17 percent or more by weight of wool made from yarns spun on the worsted system.

SECTOR PROFILE

- There are seven manufacturers of worsted fabrics, of which two firms accounted for 85 percent of Canadian shipments in 1979.
- Regionally speaking, three firms, including the two largest, are located in Quebec, with three of the remainder in Ontario and one in British Columbia.
- Employment in the manufacturing of worsted fabrics on December 31, 1979 was 1,329, a decrease of 9 percent from a year earlier.
- The domestic market for these fabrics increased by 6 percent in 1979 over 1978.
- Domestic shipments increased by 4 percent in 1979 compared to 1978.
- Imports increased by 11 percent from 1978 to 1979, with 'low-cost' imports increasing by 16 percent and developed country imports increasing by 48 percent. Most of the latter increase resulted from a 160 percent increase in the volume of Italian fabrics.

WORSTED FABRICS

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 square meters ---				
Domestic Shipments	10,831	12,356	11,894	12,491	12,979
Less Exports	<u>347</u>	<u>188</u>	<u>64</u>	<u>42</u>	<u>42</u>
Net Domestic Shipments	10,484	12,168	11,830	12,449	12,937
Imports	<u>6,109</u>	<u>6,977</u>	<u>6,422</u>	<u>6,583</u>	<u>7,306</u>
Apparent Canadian Market	16,593	19,145	18,252	19,032	20,243

Share of Market held by	--- percent ---				
Net Domestic Shipments	63	64	65	65	64
Imports	37	36	35	35	36

WORSTED FABRICS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>					
	--- '000 kilos ---				
Korea, R. of	288	233	286	218	253
Czechoslovakia	28	35	134	119	198
India	74	78	40	131	151
China, P. R. of	3	119	29	46	141
Poland	47	135	128	207	105
Argentina	neg	neg	35	4	47
Romania	neg	20	42	36	32
Uruguay	24	29	42	24	27
Hungary	-	-	7	neg	20
Chile	neg	-	neg	10	10
Colombia	18	20	29	2	5
Brazil	10	1	1	-	5
Peru	-	neg	-	-	1
Philippines	-	-	-	-	neg
Hong Kong	4	1	-	1	-
Taiwan	-	11	10	22	-
Mexico	10	10	6	10	-
Indonesia	-	neg	-	-	-
Total Low-Cost	506	693	790	831	995
<u>DEVELOPED</u>					
Italy	100	171	114	116	305
Japan	545	436	254	276	128
U.S.A.	71	54	39	73	98
United Kingdom	159	223	243	141	94
South Africa	1	-	1	20	59
Germany, West	16	20	47	37	31
France	12	12	17	18	21
Denmark	4	-	neg	neg	5
Netherlands	17	26	8	6	4
Ireland	2	2	neg	1	3
Austria	1	neg	neg	neg	-
Belgium-Lux.	1	1	-	neg	-
Finland	neg	-	-	-	-
Norway	3	3	3	-	-
Sweden	neg	neg	neg	1	-
Switzerland	1	9	2	neg	-
Australia	neg	neg	-	-	-
Total Developed	934	958	730	691	748

WORSTED FABRICS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>OTHER</u>			--- '000 kilos ---		
Spain	58	72	60	68	39
Portugal	neg	1	-	11	29
Yugoslavia	-	-	4	20	24
Greece	<u>neg</u>	<u>neg</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Other	58	73	64	100	93
TOTAL ALL SOURCES	1,499	1,724	1,585	1,623	1,837

Totals may not add due to rounding.

NYLON FABRICS

DEFINITION

Any fabric in which filament or spun nylon yarns account for 50 percent or more by weight or thread count.

SECTOR PROFILE

- There are nine Canadian manufacturers of these products.
- These manufacturers operate 16 plants, 13 of which are located in Quebec and 3 of which are located in Ontario.
- Employment in the manufacture of these fabrics has been estimated at approximately 1,275 in both 1978 and 1979.
- The nylon fabrics market has continued to increase at an annual average rate of better than 12 percent since 1974, and grew by 13.5 percent in 1979.
- Domestic shipments in 1979 declined slightly from their 1978 level, while the Canadian share of the market fell more steeply, by about 12 percentage points.
- Imports increased by 72 percent in 1979 over 1978.

NYLON FABRICS

INDEX⁽¹⁾
1975 = 100

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
Domestic Shipments	100	105	135	175	171
Less Exports	100	73	129	100	108
Net Domestic Shipments	100	110	136	184	179
Imports	100	130	115	82	142
Apparent Canadian Market	100	118	128	145	165
Share of Market held by					
Net Domestic Shipments	100	92	105	126	108
Imports	100	113	92	58	87

(1) Indexed to retain confidentiality

NYLON FABRICS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>	--- '000 kilos ---				
Romania	-	-	-	-	151
Poland	11	108	83	18	84
Korea, R. of	57	15	20	20	44
Hong Kong	7	1	3	3	33
Taiwan	15	3	10	29	29
Hungary	-	-	-	-	11
Czechoslovakia	-	-	-	-	4
India	neg	neg	2	-	neg
Singapore	-	neg	neg	-	neg
Philippines	-	-	-	8	-
China, P. R. of	-	8	9	3	-
Barbados	-	-	neg	-	-
Total Low-Cost	90	135	127	79	357
<u>DEVELOPED</u>					
U.S.A.	901	1,156	891	589	1,102
Japan	350	328	376	221	344
Italy	10	116	52	55	267
United Kingdom	195	319	322	323	169
Switzerland	9	6	34	28	25
France	4	4	10	11	18
Germany, West	15	5	1	7	12
Austria	2	-	5	5	2
Belgium-Lux.	25	39	33	6	neg
Finland	-	-	-	-	neg
Netherlands	neg	1	2	9	-
Sweden	neg	2	neg	-	-
Ireland	-	neg	neg	-	-
Norway	neg	-	neg	-	-
Denmark	5	-	-	-	-
Total Developed	1,516	1,976	1,726	1,255	1,940
<u>OTHER</u>					
Spain	neg	neg	-	-	1
TOTAL ALL SOURCES	1,607	2,112	1,852	1,334	2,297

Totals may not add due to rounding.

RAYON AND ACETATE VISCOSE FABRICS, MIXED FIBRE FABRICS AND PILE FABRICS

DEFINITION

For purposes of identification, the Textile and Consumer Products Branch uses the following Statistics Canada Import Commodity Classes to define these products:

- 374-49 - Broadwoven fabric of one vegetable fibre n.e.s.
- 375-09 - Pile fabrics broadwoven one man-made fibre
- 375-19 - Rayon broadwoven fabric
- 375-99 - Broadwoven fabrics one man-made fibre n.e.s.
- 377-59 - Pile fabrics broadwoven man-made mixture
- 377-65 - Rayon - polyester broadwoven fabrics n.e.s.
- 377-67 - Rayon man-made mixture broadwoven fabrics n.e.s.
- 377-69 - Rayon mixture broadwoven fabrics n.e.s.
- 377-79 - Broadwoven man-made mixture fabrics n.e.s.
- 377-89 - Broadwoven fabrics, mixed fibres, n.e.s.

SECTOR PROFILE

- There are 18 Canadian manufacturers of these products.
- Eleven firms are located in Quebec, six in Ontario and one in New Brunswick.
- It is estimated that 2,900 people are involved in the production of the fabrics produced in this sector.
- The market for these fabrics increased by 21 percent in 1979 over 1978, with most of the growth occurring in demand for mixed fibres fabrics and pile fabrics.
- Canadian shipments of these fabrics increased by 29 percent from 1978 to 1979.
- Imports of these fabrics grew by 12 percent in 1979 over their 1978 level.

RAYON FABRICS

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 square meters ---				
Domestic Shipments		38,585	42,915	48,885	52,364
Less Exports		<u>6,798</u>	<u>9,385</u>	<u>12,821</u>	<u>8,729</u>
Net Domestic Shipments		31,787	33,530	36,064	43,635
Imports		<u>26,101</u>	<u>19,410</u>	<u>19,317</u>	<u>15,646</u>
Apparent Canadian Market	n/a	57,888	52,940	55,381	59,281

Share of Market held by	--- percent ---				
Net Domestic Shipments		55	63	65	74
Imports		45	37	35	26

RAYON FABRICS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>	--- '000 kilos ---				
India	104	336	201	362	194
Romania	5	42	33	20	76
Czechoslovakia	95	115	84	64	74
Poland	45	26	34	6	51
Taiwan	110	177	84	114	26
Korea, R. of	31	13	25	22	5
Hungary	-	-	3	8	4
Hong Kong	neg	neg	6	2	4
Brazil	5	8	neg	5	2
China, P. R. of	neg	18	neg	neg	neg
Colombia	-	-	neg	1	-
Total Low-Cost	396	736	471	602	438
<u>DEVELOPED</u>					
U.S.A.	1,073	1,542	1,256	1,031	922
Italy	32	58	38	86	90
Japan	63	50	44	54	44
United Kingdom	34	123	73	71	29
Germany, West	15	33	27	29	21
France	5	19	13	33	18
Ireland	3	9	8	5	13
Belgium-Lux.	34	59	34	17	6
Switzerland	3	3	2	3	3
Netherlands	15	6	3	5	2
Austria	9	8	2	2	1
New Zealand	-	-	-	-	1
Denmark	neg	2	neg	2	neg
Sweden	neg	neg	5	1	-
South Africa	-	-	-	neg	-
Finland	neg	-	-	-	-
Total Developed	1,286	1,912	1,505	1,340	1,150

RAYON FABRICS

IMPORTS (Continued)

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>OTHER</u>			---	'000 kilos	---
Spain	10	1	1	3	5
Portugal	2	1	neg	2	5
Yugoslavia	26	32	8	29	4
Israel	<u>-</u>	<u>2</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Other	38	35	10	34	13
TOTAL ALL SOURCES	1,722	2,683	1,987	1,977	1,602

Totals may not add due to rounding.

MIXED FIBRE FABRICS

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 square meters ---				
Domestic Shipments		15,795	18,528	21,538	39,317
Less Exports		<u>47</u>	<u>643</u>	<u>926</u>	<u>6,771</u>
Net Domestic Shipments		15,748	17,885	20,612	32,546
Imports	<u> </u>	<u>54,269</u>	<u>53,339</u>	<u>55,544</u>	<u>64,435</u>
Apparent Canadian Market	n/a	70,017	71,224	76,156	96,981
Share of Market held by	--- percent ---				
Net Domestic Shipments		22	25	27	34
Imports		78	75	73	66

MIXED FIBRE FABRICS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>					
--- '000 kilos ---					
China, P. R. of	14	35	6	50	551
Poland	119	220	293	319	433
Czechoslovakia	66	96	77	163	342
Taiwan	14	48	210	319	279
Korea, R. of	33	60	70	271	127
Thailand	2	7	5	23	73
Mexico	65	88	34	11	19
Brazil	82	115	37	16	15
Hungary	-	15	21	14	14
Bermuda	-	-	neg	-	9
India	8	27	57	22	8
Indonesia	-	-	-	-	8
Philippines	-	5	1	-	8
Romania	33	59	50	30	5
Peru	-	-	-	-	2
El Salvador	68	37	11	10	2
Singapore	-	-	-	-	2
Hong Kong	3	neg	3	neg	neg
Malaysia	-	3	10	3	-
Argentina	-	-	1	2	-
Guatemala	-	2	-	-	-
Colombia	-	neg	neg	-	-
Bolivia	-	-	neg	-	-
Total Low-Cost	508	817	888	1,252	1,897
<u>DEVELOPED</u>					
U.S.A.	5,537	5,638	4,554	5,549	6,832
Japan	789	1,266	2,808	1,754	1,025
Italy	217	431	260	600	631
Germany, West	149	228	218	180	309
United Kingdom	137	173	132	111	174
France	101	172	117	173	114
Netherlands	53	78	62	54	52
Austria	20	44	34	38	35
Belgium-Lux.	64	105	53	27	32
Sweden	39	34	27	38	21
Switzerland	28	88	53	30	19
Ireland	2	-	2	1	8
Norway	2	7	2	1	6
Denmark	5	5	11	8	5
Finland	17	12	10	3	4
South Africa	neg	neg	2	1	neg
Australia	neg	-	-	-	neg
Total Developed	7,161	8,231	8,345	8,568	9,269

MIXED FIBRE FABRICS

IMPORTS (Continued)

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>OTHER</u>	--- '000 kilos ---				
Portugal	31	186	146	90	227
Spain	127	94	82	88	93
Yugoslavia	-	-	8	neg	6
Israel	neg	-	1	-	1
Greece	<u>1</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Other	159	281	237	178	327
 TOTAL ALL SOURCES	 7,827	 9,328	 9,472	 9,998	 11,494

Totals may not add due to rounding.

PILE FABRICS
(EXCLUDING COTTON PILE FABRICS,
AND POLYESTER-COTTON CORDUROYs)

INDEX⁽¹⁾
1976 = 100

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
Domestic Shipments		100	69	78	93
Less Exports		100	115	133	171
Net Domestic Shipments		100	69	77	91
Imports		100	98	54	75
Apparent Canadian Market		100	85	64	82
Share of Market held by					
Net Domestic Shipments		100	80	120	109
Imports		100	116	84	93

(1) Indexed to retain confidentiality

PILE FABRICS
(EXCLUDING COTTON PILE FABRICS,
AND POLYESTER-COTTON CORDUOYS)

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>	--- '000 kilos ---				
Hong Kong	neg	-	3	-	175
Poland	58	84	144	150	141
Czechoslovakia	72	136	121	134	88
Korea, R. of	-	-	-	-	35
Peru	-	-	-	-	10
Hungary	-	-	-	-	1
India	1	1	neg	-	neg
Thailand	-	-	-	5	-
Puerto Rico	-	-	-	2	-
Taiwan	-	-	5	-	-
Colombia	-	17	-	-	-
Romania	7	14	-	-	-
Brazil	3	neg	-	-	-
Malaysia	-	-	-	neg	-
Neth. Antilles	-	-	neg	-	-
Total Low-Cost	141	253	272	291	450
<u>DEVELOPED</u>					
U.S.A.	1,781	2,586	2,600	2,553	4,717
Japan	186	328	435	500	282
Belgium-Lux.	521	527	310	170	85
Italy	8	54	58	57	69
France	39	35	39	24	32
Germany, West	58	54	74	18	20
Netherlands	17	22	12	18	11
United Kingdom	5	3	6	4	2
Sweden	-	3	-	neg	neg
Norway	-	1	-	-	neg
Switzerland	neg	-	-	7	-
Austria	3	-	-	-	-
Denmark	neg	-	-	neg	-
Finland	-	neg	-	-	-
Total Developed	2,619	3,613	3,534	3,351	5,219

PILE FABRICS
(EXCLUDING COTTON PILE FABRICS,
AND POLYESTER-COTTON CORDUROYS)

IMPORTS (Continued)

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>OTHER</u>					
				---	'000 kilos'
Spain	2	3	2	34	26
Israel	-	1	1	-	-
Portugal	-	-	-	neg	-
Total Other	2	4	3	34	26
TOTAL ALL SOURCES	2,761	3,870	3,809	3,676	5,694
Less Polyester/Cotton Corduroy					
CITC 377-59-40	n/a	n/a	n/a	632	905
CITC 377-59-50	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>956</u>	<u>1,874</u>
TOTAL PILE FABRICS	2,761	3,870	3,809	2,087	2,915

Totals may not add due to rounding.

COATED FABRICS

DEFINITION

The terms coated fabrics or laminated fabrics refer to fabrics to which polymeric materials are applied as a surface film to a fabric substrate as backing. The substrate can be either woven, knitted or nonwoven fabrics of cotton, man-made fibre or paper. The polymeric materials mostly used are polyvinyl chloride and polyurethane.

SECTOR PROFILE

- There are seven Canadian manufacturers of these products. The four largest firms accounted for 92 percent of the total industry output in 1978.
- Four firms are located in Ontario, where they operate 5 plants. The remaining three firms are one-plant operations and are located in Quebec.
- Employment in the firms manufacturing coated fabrics was approximately 1,400 at the end of 1979, an increase of 38 over the 1978 level of 1,362.
- The coated fabric market in 1979 was essentially unchanged from 1978.
- Domestic shipments were also virtually unchanged in 1979 from their 1978 levels, with domestic suppliers continuing to hold about 58 percent of the market.
- Imports of polyurethane fabrics grew slightly in 1979 over 1978, while imports of vinyl fabrics decreased fractionally in 1979 from their 1978 levels.

COATED FABRICS

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 square meters ---				
Domestic Shipments	28,052	31,897	31,208	34,574	34,850
Less Exports	<u>4,300</u>	<u>4,842</u>	<u>4,817</u>	<u>5,454</u>	<u>5,500</u>
Net Domestic Shipments	23,752	27,055	26,391	29,120	29,350
Imports	<u>26,433</u>	<u>25,770</u>	<u>25,750</u>	<u>27,359</u>	<u>27,807</u>
Apparent Canadian Market	50,185	52,825	52,141	56,479	57,157
Share of Market held by	--- percent ---				
Net Domestic Shipments	47	51	51	52	51
Imports	53	49	49	48	49

COATED FABRICS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>	--- '000 kilos ---				
Korea, R. of	12	51	37	61	335
Taiwan	43	31	207	280	229
Hungary	-	-	83	335	210
Colombia	15	-	-	54	53
Peru	-	-	-	1	-
Mexico	-	-	4	-	-
Argentina	-	5	-	-	-
Thailand	1	-	-	-	-
Hong Kong	<u>neg</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Low-Cost	72	88	332	731	826
<u>DEVELOPED</u>					
U.S.A.	13,697	13,208	12,557	12,198	12,329
United Kingdom	717	465	580	1,039	751
Italy	145	190	181	194	395
Japan	407	453	512	472	305
Germany, West	236	233	219	198	244
France	67	107	73	46	57
Belgium-Lux.	20	25	17	24	34
Switzerland	2	neg	6	27	34
Netherlands	1	10	9	12	21
Finland	neg	1	2	1	2
Sweden	2	1	1	3	2
Australia	-	-	-	neg	neg
Ireland	-	-	-	-	neg
Denmark	-	-	1	11	-
Norway	<u>-</u>	<u>-</u>	<u>-</u>	<u>2</u>	<u>-</u>
Total Developed	15,294	14,694	14,158	14,227	14,175
<u>OTHER</u>					
Spain	67	114	97	191	246
TOTAL ALL SOURCES	15,433	14,897	14,586	15,150	15,246

Totals may not add due to rounding.

VINYL COATED FABRICS

INDEX⁽¹⁾
1975 = 100

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
Domestic Shipments	100	114	112	125	126
Less Exports	100	113	112	127	128
Net Domestic Shipments	100	115	112	124	126
Imports	100	95	91	92	91
Apparent Canadian Market	100	105	101	107	108
Share of Market held by					
Net Domestic Shipments	100	108	110	114	116
Imports	100	92	90	86	84

(1) Indexed to retain confidentiality

VINYL COATED FABRICS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>	--- '000 kilos ---				
Korea, R. of	11	44	33	50	335
Taiwan	43	31	188	244	194
Colombia	15	-	-	54	53
Hungary	-	-	7	25	-
Peru	-	-	-	1	-
Mexico	-	-	neg	-	-
Argentina	-	5	-	-	-
Thailand	1	-	-	-	-
Total Low-Cost	71	81	228	376	581
<u>DEVELOPED</u>					
U.S.A.	13,437	12,887	12,019	11,477	11,575
United Kingdom	711	447	543	1,003	704
Japan	326	364	392	334	174
Germany, West	144	147	162	110	117
Italy	73	127	51	52	76
France	24	23	18	42	56
Switzerland	2	-	6	27	34
Belgium-Lux.	4	13	6	24	29
Netherlands	1	7	8	12	21
Finland	neg	1	neg	1	2
Sweden	2	1	1	2	neg
Australia	-	-	-	neg	neg
Ireland	-	-	-	-	neg
Denmark	-	-	1	11	-
Norway	-	-	-	2	-
Total Developed	14,722	14,018	13,207	13,098	12,789
<u>OTHER</u>					
Spain	neg	4	12	64	63
TOTAL ALL SOURCES	14,794	14,102	13,446	13,539	13,433

Totals may not add due to rounding.

POLYURETHANE COATED FABRICS

INDEX⁽¹⁾
1975 = 100

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
Domestic Shipments	100	89	65	53	34
Less Exports	-	-	-	-	-
Net Domestic Shipments	100	89	65	53	34
Imports	100	124	178	252	284
Apparent Canadian Market	100	116	152	207	226
Share of Market held by					
Net Domestic Shipments	100	78	43	26	13
Imports	100	106	117	122	126

(1) Indexed to retain confidentiality

POLYURETHANE COATED FABRICS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>	--- '000 kilos ---				
Hungary	-	-	77	309	210
Taiwan	-	-	19	36	36
Korea, R. of	1	6	5	10	-
Mexico	-	-	4	-	-
Hong Kong	<u>neg</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Low-Cost	1	6	104	356	246
<u>DEVELOPED</u>					
U.S.A.	261	321	539	721	754
Italy	73	64	130	142	319
Japan	81	88	119	138	131
Germany, West	92	86	57	88	127
United Kingdom	6	19	37	35	47
Belgium-Lux.	16	12	12	neg	5
France	43	84	55	4	1
Sweden	neg	-	-	neg	1
Netherlands	-	3	1	-	neg
Switzerland	neg	neg	neg	neg	-
Finland	<u>-</u>	<u>-</u>	<u>1</u>	<u>-</u>	<u>-</u>
Total Developed	571	677	951	1,129	1,385
<u>OTHER</u>					
Spain	67	110	85	127	183
TOTAL ALL SOURCES	639	795	1,140	1,612	1,814

Totals may not add due to rounding.

WARP-KNIT FABRICS

DEFINITION

Warp-knit fabric is the generic term for flat or open width fabrics produced on tricot, Rachel or simplex machines by feeding numerous ends of yarn from warps or beams longitudinally to a series of needles arrayed in a lateral formation, each end of the warp yarn being fed to an individual needle.

SECTOR PROFILE

- There were fourteen Canadian firms manufacturing warp-knit fabrics, with the five major firms accounting for 78 percent of production in 1979.
- Nine firms were located in Quebec and five in Ontario. One company in Quebec ceased production in late 1979 but data relevant to that company is included in the figures presented on this sector.
- Employment in the industry increased from 894 in 1978 to 1,028 in 1979, an increase of 15 percent. The company which ceased operations in 1979 was not a major employer.
- The warp-knit fabric market increased by 15 percent in 1979 over 1978, rising to a record level since 1969.
- Domestic shipments increased by 6 percent in 1979 over 1978, and accounted for 82.5 percent of the market.
- Imports increased by 91.4 percent in 1979 over 1978, and increased their market share by over 7 percentage points.

WARP-KNIT FABRICS

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 kilos ---				
Domestic Shipments	8,024	8,191	7,778	9,328	9,964
Less Exports	<u>106</u>	<u>35</u>	<u>160</u>	<u>133</u>	<u>301</u>
Net Domestic Shipments	7,918	8,156	7,618	9,195	9,663
Imports	<u>3,196</u>	<u>2,912</u>	<u>2,463</u>	<u>1,209</u>	<u>2,314</u>
Apparent Canadian Market	11,114	11,068	10,081	10,404	11,977
Share of Market held by	--- percent ---				
Net Domestic Shipments	71	74	76	88	81
Imports	29	26	24	12	19

WARP-KNIT FABRICS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>	--- '000 kilos ---				
Malta	7	20	12	20	8
Korea, R. of	1	-	3	6	2
Taiwan	4	-	36	-	2
Hong Kong	5	neg	neg	-	neg
Poland	-	-	-	-	neg
Singapore	1	5	11	-	-
Barbados	-	-	9	-	-
India	-	8	-	-	-
Hungary	-	5	-	-	-
Malaysia	-	4	-	-	-
Philippines	-	1	-	-	-
Morocco	-	1	-	-	-
Bolivia	-	neg	-	-	-
U.S. Virgin Is.	-	neg	-	-	-
Brazil	neg	-	-	-	-
Total Low-Cost	20	45	72	26	13
<u>DEVELOPED</u>					
U.S.A.	2,003	2,078	2,076	978	2,146
Japan	929	554	160	107	61
United Kingdom	67	73	30	35	41
Germany, West	77	35	20	29	16
Italy	44	52	43	17	10
France	15	13	20	9	6
Norway	-	-	-	1	5
Austria	1	1	5	neg	2
Netherlands	2	5	2	1	1
Switzerland	4	1	4	neg	1
Sweden	13	neg	neg	neg	-
Australia	-	-	neg	-	-
Belgium-Lux.	neg	2	-	-	-
South Africa	-	1	-	-	-
Ireland	neg	-	-	-	-
Total Developed	3,154	2,815	2,360	1,176	2,289

(Continued)

TERRY TOWELS, WASHCLOTHS AND SETS

DEFINITION

Towels and washcloths are made of fabrics woven on terry looms using single or plied cotton or blend yarns, with loop pile on one or both sides covering the entire surface or part of the surface to form designs or patterns such as stripes, checks, etc., whether greige, bleached, dyed or printed. Towels are normally made in rectangular form and range in size up to approximately 91 centimetres in width and 182 centimetres in length. Depending on size, towels are designated frequently as tea, hand or bath towels, or bath sheets. Washcloths are normally made in square or rectangular form ranging in size from 323 square centimetres to 1,090 square centimetres.

SECTOR PROFILE

- There are three Canadian manufacturers of these products.
- Two firms are located in Ontario and one is in Québec.
- Employment in this sector was approximately 900 at December 31, 1979, compared to 962 at the same time in 1978.
- The market for these goods increased by almost 4 percent in 1979 over 1978.
- Domestic shipments rose by almost 7 percent from 1978 to 1979, and market share held by domestic manufacturers increased slightly to 65 percent.
- Imports in 1979 were down fractionally from their 1978 level.

TERRY TOWELS, WASHCLOTHS AND SETS,
EXCLUDING BATH MATS

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 kilos ---				
Domestic Shipments	3,402	3,468	2,981	4,246	4,553
Less Exports	<u>-</u>	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>26</u>
Net Domestic Shipments	3,402	3,468	2,981	4,246	4,527
Imports	<u>2,168</u>	<u>3,412</u>	<u>2,567</u>	<u>2,477</u>	<u>2,440</u>
Apparent Canadian Market	5,570	6,880	5,548	6,723	6,967

Share of Market held by	--- percent ---				
Net Domestic Shipments	61	50	54	63	65
Imports	39	50	46	37	35

TERRY TOWELS, WASHCLOTHS AND SETS
EXCLUDING BATH MATS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>					
	--- '000 kilos ---				
China, P. R. of	582	1,029	1,070	661	832
Poland	228	581	371	415	416
Pakistan	136	159	76	146	242
Czechoslovakia	23	74	82	139	147
Brazil	49	154	70	110	120
India	95	93	178	328	111
Hong Kong	77	214	159	176	102
Korea, R. of	57	157	79	44	47
Taiwan	124	129	53	83	35
Thailand	-	45	10	22	19
El Salvador	27	50	49	22	11
Argentina	-	-	-	2	neg
Romania	4	-	-	2	-
Singapore	-	14	-	-	-
Korea, North	-	7	-	-	-
Total Low-Cost	1,402	2,705	2,197	2,150	2,082
<u>DEVELOPED</u>					
U.S.A.	686	606	312	279	322
Italy	13	20	15	26	26
Japan	60	66	24	5	5
Germany, West	3	1	neg	1	1
Belgium-Lux.	neg	3	5	1	1
France	1	neg	5	neg	1
United Kingdom	neg	3	2	3	neg
Switzerland	-	-	-	-	neg
Netherlands	1	2	1	neg	neg
Finland	neg	neg	neg	neg	neg
Ireland	1	1	neg	neg	-
Denmark	neg	-	-	-	-
South Africa	neg	-	-	-	-
Australia	-	-	1	neg	-
New Zealand	-	-	neg	-	-
Total Developed	766	703	367	318	357

(Continued)

TERRY TOWELS, WASHCLOTHS AND SETS
EXCLUDING BATH MATS

IMPORTS (Continued)

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>OTHER</u>			---	'000 kilos	---
Portugal	-	3	neg	1	1
Spain	1	1	2	8	-
Israel	<u>-</u>	<u>-</u>	<u>neg</u>	<u>-</u>	<u>-</u>
Total Other	1	5	3	9	1
 TOTAL ALL SOURCES	 2,168	 3,412	 2,567	 2,477	 2,440

Totals may not add due to rounding.

SHEETS AND PILLOWCASES

DEFINITION

Bedsheets and pillowcases are made of woven fabric of cotton or man-made yarns or blends thereof and include flannelette sheets and/or blankets. Bedsheets can be flat or fitted for a number of bed sizes, e.g. king size, queen size, double, twin and single.

SECTOR PROFILE

- There are only two firms manufacturing these products in Canada.
- Both of these firms are located in Quebec, where one firm has one plant producing these products, and the other has three plants producing the same types of goods.
- Employment in this sector is estimated to have been 2,130 at the end of 1979, which is unchanged from the June 30, 1979 employment estimate, and compares to estimated employment of about 1,992 people at December 31, 1977.
- The market for these products in Canada has grown by one percent and 9 percent for bedsheets and pillowcases, respectively, in 1979 over 1978.
- During the same period, domestic shipments of bedsheets and pillowcases grew by 9 percent and 7 percent, respectively. Domestic manufacturers held 77 percent of the market for bedsheets and 60 percent of the market for pillowcases, in 1979.
- Imports of both bedsheets and pillowcases declined in 1979 over 1978.

SHEETS, BED

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 units ---				
Domestic Shipments	8,332	9,559	9,089	10,254	11,219
Less Exports	<u>16</u>	<u>7</u>	<u>5</u>	<u>6</u>	<u>24</u>
Net Domestic Shipments	8,316	9,552	9,084	10,248	11,195
Imports	<u>6,393</u>	<u>8,786</u>	<u>5,200</u>	<u>4,212</u>	<u>3,359</u>
Apparent Canadian Market	14,709	18,338	14,284	14,460	14,554
Share of Market held by	--- percent ---				
Net Domestic Shipments	57	52	64	71	77
Imports	43	48	36	29	23

SHEETS, BED

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>					
	--- '000 units ---				
Hong Kong	242	749	640	266	309
China, P. R. of	203	573	255	380	298
Poland	137	395	70	420	204
Pakistan	1	4	-	1	30
India	186	73	47	70	14
Romania	-	-	-	77	-
Singapore	-	neg	-	1	-
Taiwan	1,244	2,941	1,073	246	-
Viet Nam	-	-	-	neg	-
Brazil	1	-	-	neg	-
Malaysia	-	-	neg	-	-
Total Low-Cost	2,014	4,735	2,085	1,461	855
<u>DEVELOPED</u>					
U.S.A.	3,970	3,790	3,063	2,712	2,465
Italy	37	24	29	25	28
United Kingdom	13	12	5	5	5
Japan	355	211	neg	neg	1
Sweden	-	-	-	-	1
Switzerland	-	-	-	-	neg
France	neg	1	neg	-	neg
Germany, West	neg	neg	1	-	neg
Denmark	-	-	1	-	-
Netherlands	-	1	-	-	-
Total Developed	4,375	4,039	3,099	2,742	2,500
<u>OTHER</u>					
Portugal	-	-	-	neg	1
Spain	4	12	16	8	1
Total Other	4	12	16	8	2
 TOTAL ALL SOURCES	 6,393	 8,786	 5,200	 4,212	 3,359

Totals may not add due to rounding.

PILLOWCASES

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 units ---				
Domestic Shipments	5,772	7,308	6,612	7,488	8,040
Less Exports	<u>24</u>	<u>12</u>	<u>neg</u>	<u>neg</u>	<u>neg</u>
Net Domestic Shipments	5,748	7,296	6,612	7,488	8,040
Imports	<u>7,112</u>	<u>10,202</u>	<u>5,463</u>	<u>4,754</u>	<u>5,268</u>
Apparent Canadian Market	12,860	17,498	12,075	12,242	13,308
	--- percent ---				
Share of Market held by					
Net Domestic Shipments	45	42	55	61	60
Imports	55	58	45	39	40

PILLOWCASES

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>					
	--- '000 units ---				
China, P. R. of	1,684	3,331	1,467	1,600	2,752
Hong Kong	101	82	149	44	106
India	198	148	256	121	99
Poland	22	208	36	78	60
Taiwan	1,217	2,803	725	166	57
Romania	365	515	348	276	46
Pakistan	1	-	-	124	1
Singapore	-	-	-	-	neg
Total Low-Cost	3,588	7,087	2,981	2,409	3,121
<u>DEVELOPED</u>					
U.S.A.	3,060	2,832	2,412	2,304	2,124
Japan	447	208	35	4	7
United Kingdom	10	42	33	34	6
Sweden	neg	-	neg	3	5
Germany, West	3	30	1	-	3
Italy	1	-	-	-	neg
Switzerland	neg	2	1	-	-
Total Developed	3,521	3,114	2,482	2,345	2,145
<u>OTHER</u>					
Portugal	2	-	-	-	-
Total Other	2	-	-	-	-
TOTAL ALL SOURCES	7,112	10,202	5,463	4,754	5,268

Totals may not add due to rounding.

HOSIERY

DEFINITION

The types of hosiery being restrained are classified by Statistics Canada as follows:

- 785-24 Hosiery, men's and boys', man-made fabrics
- 785-25 Hosiery, men's and boys', n.e.s.
- 785-39 Hosiery, women's and girls', n.e.s.
- 785-49 Hosiery, children's and infants

SECTOR PROFILE

- There are 45 firms manufacturing hosiery other than ladies' pantyhose and seamless or full-fashioned hosiery.
- Twenty-four firms are located in Ontario, twenty in Québec, and one in Nova Scotia.
- Employment in these firms in 1979 was 2,352, an increase of 10 percent over the level of 2,136 in 1978.
- The Canadian market for these kinds of hosiery increased by over 16 percent in 1979, rising from 6,399,000 dozen pairs in 1978 to 7,458,000 dozen pairs in 1979.
- Canadian shipments increased from 1978 to 1979, but market share held by Canadian manufacturers declined slightly in 1979.
- Imports grew by 30 percent from 1978 to 1979, with several potentially large exporters of low-cost hosiery beginning to supply significant volumes to the Canadian market.

HOSIERY

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 dozen pairs ---				
Domestic Shipments	4,228	4,106	4,278	4,511	4,945
Less Exports	<u>43</u>	<u>31</u>	<u>34</u>	<u>90</u>	<u>64</u>
Net Domestic Shipments	4,185	4,075	4,244	4,421	4,881
Imports	<u>1,752</u>	<u>2,375</u>	<u>2,406</u>	<u>1,978</u>	<u>2,577</u>
Apparent Canadian Market	5,937	6,450	6,650	6,399	7,458
Share of Market held by	--- percent ---				
Net Domestic Shipments	70	63	64	69	65
Imports	30	37	36	31	35

HOSIERY

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>	--- '000 dozen pairs ---				
Korea, R. of	430	1,046	809	406	586
Taiwan	283	119	203	215	273
China, P. R. of	18	20	30	56	143
Malaysia	2	-	2	16	74
Singapore	119	84	62	61	51
India	2	43	106	127	41
Thailand	2	-	-	14	29
Poland	53	10	-	-	4
Hong Kong	2	3	9	2	1
Afghanistan	neg	6	1	1	1
Hungary	-	-	-	3	-
Czechoslovakia	-	-	3	-	-
Korea, North	-	2	1	-	-
Philippines	neg	neg	-	-	-
Pakistan	neg	-	-	-	-
Total Low-Cost	911	1,333	1,226	901	1,203
<u>DEVELOPED</u>					
U.S.A.	520	627	753	942	1,237
United Kingdom	201	269	229	79	89
Italy	8	18	33	26	26
France	4	13	8	10	10
Norway	neg	6	7	3	3
Germany West	neg	2	4	2	2
Japan	1	2	7	1	1
Austria	neg	1	4	2	-
Netherlands	neg	1	1	-	-
Switzerland	neg	neg	1	-	-
Sweden	neg	neg	neg	neg	-
Finland	neg	-	neg	neg	-
Iceland	neg	-	-	neg	-
Denmark	neg	-	-	-	-
South Africa	neg	-	-	-	-
Total Developed	734	939	1,047	1,065	1,368

(Continued)

HOSIERY

IMPORTS (Continued)

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>OTHER</u>					
			--- '000 dozen pairs ---		
Israel	100	100	134	10	3
Spain	<u>1</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>2</u>
Total Other	101	101	136	13	5
 TOTAL ALL SOURCES	 1,752	 2,375	 2,406	 1,978	 2,577

Totals may not add due to rounding.

CORDAGE, ROPE AND TWINE

DEFINITION

Cordage, rope and twine includes all types of ropes, cables, twines and cords of any fibre content.

SECTOR PROFILE

- There are 20 firms manufacturing these products in Canada.
- These firms are located in 8 different provinces, but the 9 firms located in Ontario account for 75 percent of total manufacturing employment in this sector. Four firms dominate the industry and accounted for 85 percent of Canadian shipments during 1979.
- Employment in 1979 reached 635, an increase of 21 percent over 1978.
- The Canadian market for these products increased by 28 percent in 1979 over 1978.
- Domestic shipments increased by almost 42 percent from 1978 to 1979. Share of market held by domestic manufacturers increased slightly, but was still low at 24.5 percent.
- Imports increased by over 6 million kilos, or 26 percent, from 1978 to 1979.

CORDAGE, ROPE AND TWINE
ALL PRODUCTS

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 kilos ---				
Domestic Shipments	10,457	7,600	7,750	7,726	10,129
Less Exports	<u>978</u>	<u>825</u>	<u>1,083</u>	<u>839</u>	<u>783</u>
Net Domestic Shipments	9,479	6,775	6,667	6,887	9,346
Imports	<u>38,365</u>	<u>28,900</u>	<u>35,671</u>	<u>24,255</u>	<u>30,533</u>
Apparent Canadian Market	47,844	35,675	42,338	31,142	39,879
Share of Market held by	--- percent ---				
Net Domestic Shipments	20	19	16	22	23
Imports	80	81	84	78	77

CORDAGE, ROPE AND TWINE
ALL PRODUCTS

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>	--- '000 kilos ---				
Mexico	868	7,022	10,047	4,265	9,455
Brazil	5,733	4,552	11,087	6,706	8,938
Tanzania	2,195	6,911	3,715	875	1,666
Korea, R. of	596	702	936	1,234	1,189
Philippines	303	420	351	352	456
Haiti	1,447	66	-	275	259
Thailand	50	496	695	314	222
Taiwan	130	476	241	110	132
India	46	44	60	27	19
Cuba	-	-	-	-	15
Hong Kong	4	20	4	1	3
Singapore	-	-	2	neg	3
Hungary	-	-	-	-	1
Czechoslovakia	neg	neg	neg	neg	-
Kenya	1,690	460	242	430	-
Bangladesh	5	neg	3	13	-
French Africa, n.e.s.	-	-	53	-	-
Mozambique	2,176	145	-	43	-
Korea, North	-	59	5	50	-
Venezuela	9	-	11	-	-
Pakistan	neg	-	-	-	-
Puerto Rico	neg	-	-	-	-
Colombia	16	54	-	-	-
Nigeria	-	-	-	neg	-
China, P. R. of	3	neg	-	-	-
Total Low-Cost	15,271	21,428	27,454	14,697	22,360

(Continued)

CORDAGE, ROPE AND TWINE
ALL PRODUCTS

IMPORTS (Continued)

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 kilos ---				
U.S.A.	6,846	3,664	5,031	5,862	4,058
Germany, West	3,121	544	1,287	920	1,429
United Kingdom	1,642	1,099	421	398	597
Japan	1,097	201	163	171	149
South Africa	12	2	109	128	129
Belgium-Lux.	5,010	303	31	58	125
Norway	51	43	122	199	102
Netherlands	293	129	156	263	55
Italy	34	22	21	48	39
Denmark	536	22	9	63	36
Finland	1	1	1	7	16
France	276	126	2	6	6
Austria	neg	8	2	2	6
Switzerland	253	13	5	5	5
Ireland	1,660	343	8	6	5
Iceland	-	-	3	8	4
Sweden	300	20	13	14	4
Total Developed	21,133	6,541	7,385	8,157	6,764
<u>OTHER</u>					
Portugal	1,729	911	742	1,203	1,209
Spain	233	20	89	200	200
Israel	-	-	1	-	-
Total Other	1,962	931	832	1,403	1,409
TOTAL ALL SOURCES	38,365	28,900	35,671	24,255	30,533

Totals may not add due to rounding.

DEFINITION

All clothing subject to restraint, i.e. outerwear, pants and slacks, shorts, overalls and coveralls, unstructured suits, blouses, T-shirts, sweatshirts, pyjamas and sleepwear, bathrobes and dressing gowns, raincoats, dresses, skirts, suits and coordinates, athletic suits, foundation garments, swimsuits, underwear, outer-jackets, overcoats and topcoats, professional and shop coats, structured sportcoats and blazers, structured suits, leather coats and jackets, shirts, sweaters, pullovers and cardigans.

INDUSTRY PROFILE

- Based on 1977 Statistics Canada data, the clothing industry, as defined above, was comprised of 1,650 establishments, including 344 contractors.
- Regionally speaking the industry is primarily located in Québec (71 percent) Ontario (20 percent) and Manitoba (4 percent).
- Contractors are primarily located in the Province of Québec (90 percent) based on 1977 statistics.
- Based on 1977 statistics there were 91,294 production and related workers. Manufacturing employment represented 84 percent with 76,232 production employees, contractors 16 percent with 15,062 production employees.
- Underwear (Control No. 45) pants, slacks and shorts (Control No. 37) skirts, suits and coordinates (Control No. 42) and blouses, T-shirts and sweatshirts (Control No. 39) were the major products shipped in order of importance during 1979 and accounted for 65 percent of total shipments during that year.

- Blouses, T-shirts and sweatshirts (Control No. 39), pants, slacks and shorts (Control No. 37), sweaters, pullovers and cardigans (Control No. 50) and men's and boys' shirts (Control No. 49) were the major products imported in order of magnitude during 1979 and accounted for 69 percent of total imports during that year.
- Taiwan, Hong Kong, the Republic of Korea and the People's Republic of China were the major sources of imports in order of importance from restrained sources during 1979 and represented 89 percent of all imports from such sources and 69 percent of imports from all sources.
- The United States, Italy, Poland, the People's Republic of China and France were major sources of imports of products not being restrained by individual sources in 1979 and represented 62 percent of all imports from such sources and 14 percent of imports from all sources.
- During the period 1975 to 1979 domestic shipments increased by 7.4 percent for a yearly average increase of 1.9 percent. During this same period, imports decreased by 8.1 percent or by an average of 2.0 percent yearly.
- 1981 restraint levels are 100.6 percent of 1979 total imports from all sources.

ALL CLOTHING SUBJECT TO
RESTRAINT MEASURES

APPARENT CANADIAN MARKET

CONTROL NOS. 32, 37 TO 50

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	345,834	340,461	333,068	360,867	371,447
Less Exports ⁽¹⁾	<u>3,525</u>	<u>3,378</u>	<u>3,670</u>	<u>3,171</u>	<u>3,167</u>
Net Domestic Shipments	342,309	337,083	329,398	357,696	368,280
Imports ⁽²⁾	<u>182,151</u>	<u>266,929</u>	<u>180,608</u>	<u>163,874</u>	<u>167,474</u>
Apparent Canadian Market	524,460	604,012	510,006	521,570	535,754
Share of Market held by	--- percent ---				
Net Domestic Shipments	65	56	65	69	69
Imports	35	44	35	31	31

ALL CLOTHING SUBJECT TO
RESTRAINT MEASURES

IMPORTS

CONTROL NOS. 32, 37 TO 50

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	Restraint levels <u>1981</u>
<u>RESTRAINED</u>	--- '000 garments ---					
Taiwan	49,714	73,290	46,115	45,553	40,935	53,265
Hong Kong	34,518	55,469	38,409	36,882	32,846	39,449
Korea, R. of	29,610	45,616	35,455	31,300	23,465	35,539
China, P. R. of	11,443	24,485	18,048	13,883	18,381	17,327 (5)
India	3,422	5,431	2,366	2,070	3,594	5,053
Philippines	2,578	3,743	2,215	2,138	3,320	4,737
Romania	1,891	2,805	1,569	1,526	2,127	2,782
Poland	1,168	1,974	1,799	2,628	1,342	1,620
Malaysia	1,163	1,460	769	758	1,317	1,499
Singapore	730	400	140	187	1,113	2,635(3)
Thailand	241	135	21	87	972	1,764
Macao	120	193	125	661	644	1,057
Bulgaria	54	26	20	53	329	1,012
Sri Lanka	-	-	5	4	192	666
Hungary	8	11	8	28	40	27
Total Restrained	136,660	215,038	147,064	137,758	130,617	168,431(20)

ALL CLOTHING SUBJECT TO
RESTRAINT MEASURES

IMPORTS (Continued)

CONTROL NOS. 32, 37 TO 50

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>UNRESTRAINED LOW-COST</u>	--- '000 garments ---				
Poland	501	378	321	820	3,788
China, P. R. of	465	2,203	484	403	2,830
Pakistan	6,319	5,297	2,318	1,195	1,204
Brazil	2,748	2,657	809	595	904
Romania	167	320	127	186	820
Mexico	1,833	1,934	814	727	768
Puerto Rico	1,538	2,153	1,722	321	575
Hungary	54	38	65	150	451
Korea, R. of	75	85	87	84	329
Indonesia	7	2	neg	neg	325
Philippines	208	238	137	132	230
Hong Kong	192	289	174	83	212
Leew-Wind	-	-	-	-	183
Barbados	25	120	140	287	167
Malaysia	103	351	234	52	137
Czechoslovakia	198	203	180	153	137
Thailand	22	12	39	7	127
Sri Lanka	-	-	38	10	85
Morocco	274	380	234	107	74
El Salvador	77	40	5	30	74
Haiti	neg	2	1	-	51
Honduras	-	-	-	-	48
India	12	36	10	42	46
Macao	-	8	2	neg	40
Singapore	-	1	35	1	36
Uruguay	6	108	10	4	35
Malta	27	54	6	12	20
Panama	91	28	6	5	19

(Continued)

ALL CLOTHING SUBJECT TO
RESTRAINT MEASURES

IMPORTS (Continued)

CONTROL NOS. 32, 37 TO 50

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>UNRESTRAINED LOW-COST</u> (Continued)	--- '000 garments ---				
Turkey	31	80	25	1	17
Afghanistan	20	22	33	17	14
Cyprus	2	-	3	2	13
Colombia	359	348	32	1	12
Bolivia	16	22	15	13	10
Argentina	2	57	10	2	9
Ecuador	8	8	11	8	9
Peru	neg	neg	2	3	6
Korea, North	6	88	22	-	4
Jamaica	5	167	10	neg	3
Guatemala	25	10	3	2	2
Venezuela	neg	neg	1	16	1
Bulgaria	30	5	4	neg	1
Egypt	-	-	-	1	neg
Algeria	-	-	-	-	neg
Chile	2	-	-	neg	neg
Iran	neg	-	-	-	neg
Togo	-	-	-	16	-
Trinidad	3	12	9	-	-
Mauritius	13	1	6	-	-
Viet Nam	194	-	-	-	-
Nicaragua	19	7	-	-	-
Malawi	-	9	-	-	-
Costa Rica	7	-	-	-	-
U.S.S.R.	2	-	-	-	-
Guyana	1	-	neg	-	-
Virgin Islands	-	-	neg	-	-
Total Unrestrained Low-Cost	15,687	17,773	8,184	5,488	13,816

ALL CLOTHING SUBJECT TO
RESTRAINT MEASURES

IMPORTS (Continued)

CONTROL NOS. 32, 37 TO 50

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.	10,708	13,189	9,400	7,369	9,465
Italy	3,404	4,404	3,314	2,931	3,821
France	2,721	2,936	2,485	2,796	2,810
United Kingdom	3,922	4,277	3,043	2,465	1,766
Japan	3,346	3,345	3,630	1,688	1,182
Germany, West	456	853	683	609	699
Sweden	129	91	114	261	149
Austria	94	161	97	75	134
Finland	31	46	68	55	120
Switzerland	81	81	78	98	84
Iceland	7	20	19	48	78
Ireland	29	40	27	60	62
Netherlands	128	109	71	38	61
Norway	52	67	97	73	46
South Africa	7	8	18	15	30
New Zealand	7	12	3	15	27
Belgium	173	41	21	36	23
Denmark	173	57	61	29	22
Australia	40	12	12	12	6
Total Developed	25,508	29,749	23,241	18,673	20,585
<u>OTHER</u>					
Spain	1,928	2,330	1,413	1,319	1,569
Portugal	749	365	82	112	332
Israel	1,475	1,562	507	298	225
Yugoslavia	45	25	31	100	178
Greece	94	86	81	123	152
Total Other	4,291	4,368	2,114	1,952	2,456
 TOTAL ALL SOURCES	 182,151	 266,929	 180,608	 163,874	 167,474

Totals may not add due to rounding.

DEFINITION

Winter outerwear garments, men's, boys', women's, girls', children's and infants', (commonly referred to as snowsuits, snow-mobile suits, ski suits, ski pants and snow-pants, and jackets and vests including parkas, ski-jackets, and similar jacket-type garments) that have an outer shell manufactured substantially by surface area with woven fabrics and that are lined and designed to protect the wearer against cold, e.g. quilted linings, down or fibre filling, etc., but not plain acetate or viscose lining, wholly or mainly by weight of cotton, man-made fibres or wool, or blends thereof, but excluding: all unlined outerwear; all coats three-quarter length or longer, that is, to the knee or below the knee; garments commonly known as squall jackets, windbreakers or similar jacket-type garments where there is no thermal insulation; bona fide industrial end-use clothing, although they meet the requirements of the above description; and ski-pants and cross-country ski-suits which do not meet the above description (e.g., constructed entirely from knitted fabric)

SECTOR PROFILE

- Based on the latest statistics available (1976) the Canadian outerwear industry is comprised of 123 firms.
- Regionally speaking the industry is located primarily in Québec (57 percent) and Ontario and Manitoba (15 percent) each.
- Major centres of production in order of importance are Montréal, Winnipeg and Toronto.
- From a survey of 30 firms in 1978, representing 41 percent of domestic shipments, production employees were reported as being 2,269.

- In 1979, it is estimated that adult outerwear (men's, boys', women's and girls') accounted for 85 percent of the total number of garments shipped. Children's and infants' outerwear accounted for 15 percent.
- From 1975 to 1979, domestic shipments of outerwear increased by 13.9 percent for a yearly average increase of 3.5 percent. Adult outerwear increased by 21.5 percent during that period for a yearly average of 5.3 percent. Children's outerwear on the other hand decreased by 15.5 percent for an average annual decrease of 3.8 percent.
- In 1979, imports of outerwear were restrained from ten sources which accounted for 91 percent of total garments imported.
- In addition to outerwear, firms in this industry sector also produce pants, raincoats, athletic suits, overcoats and top coats and outer jackets.

OUTERWEAR

APPARENT CANADIAN MARKET

CONTROL NO. 32

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	6,292	5,871	5,761	6,442	7,170
Less Exports ⁽¹⁾	<u>451</u>	<u>420</u>	<u>278</u>	<u>282</u>	<u>277</u>
Net Domestic Shipments	5,841	5,451	5,483	6,160	6,893
Imports ⁽¹²⁾	<u>2,017</u>	<u>3,914</u>	<u>1,788</u>	<u>1,562</u>	<u>3,068</u>
Apparent Canadian Market	7,858	9,365	7,271	7,722	9,961
Share of Market held by	--- percent ---				
Net Domestic Shipments	74	58	75	80	69
Imports	26	42	25	20	31

OUTERWEAR

IMPORTS

CONTROL NO. 32

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	Restraint levels <u>1981</u>
<u>RESTRAINED</u>	--- '000 garments ---					
Korea, R. of	1,098	2,617	1,285	1,046	1,781	2,045
Hong Kong	536	752	350	314	524	548
China, P. R. of	44	61	5	5	280	225 (5)
Taiwan	99	309	56	46	48	51
Philippines	17	32	25	-	45	62
Singapore	-	1	-	21	33	84 (3)
Thailand	-	-	neg	13	27	56
Romania	-	29	neg	-	25	53
Macao	-	-	-	neg	13	27
Bulgaria	-	-	-	-	-	28
Total Restrained	1,794	3,801	1,721	1,445	2,776	3,179 (4)
<u>UNRESTRAINED LOW-COST</u>						
Leew-Wind	-	-	-	-	11	
Czechoslovakia	-	-	-	-	2	
Ecuador	-	-	-	1	2	
Mexico	-	-	-	neg	2	
Uruguay	-	-	-	-	1	
Barbados	-	-	-	1	1	
Jamaica	-	-	-	-	1	
Algeria	-	-	-	-	neg	
India	-	neg	-	1	neg	
Malaysia	-	-	-	-	neg	
Afghanistan	-	-	-	-	neg	
Bolivia	-	-	-	-	neg	
Brazil	10	18	2	-	neg	
Colombia	-	-	-	-	neg	
Peru	-	-	-	-	neg	
Guatemala	-	-	-	-	neg	
Total Unrestrained Low-Cost	10	18	2	3	20	

OUTERWEAR

IMPORTS (Continued)

CONTROL NO. 32

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>					
	--- '000 garments ---				
France	1	1	12	25	104
U.S.A.	15	22	13	16	60
Italy	2	9	9	10	23
Austria	1	1	1	16	16
Switzerland	1	1	1	11	10
United Kingdom	1	3	4	3	7
Japan	188	50	18	24	4
Finland	1	1	1	1	3
Germany, West	2	3	4	4	2
Ireland	-	-	-	neg	1
Iceland	-	-	-	neg	1
Norway	-	-	-	neg	1
Australia	-	-	-	-	1
Belgium	-	-	-	neg	neg
Denmark	-	-	neg	2	neg
Netherlands	-	-	-	-	neg
Sweden	neg	neg	neg	neg	neg
New Zealand	-	3	neg	-	neg
South Africa	-	-	neg	-	-
Total Developed	212	94	63	112	233
<u>OTHER</u>					
Spain	-	-	-	1	27
Portugal	1	neg	-	-	5
Yugoslavia	-	-	-	-	2
Greece	-	-	-	-	1
Israel	neg	neg	1	-	1
Total Other	1	neg	1	1	36
TOTAL ALL SOURCES	2,017	3,914	1,788	1,562	3,068

Totals may not add due to rounding.

OUTERWEAR - WOMEN'S,
GIRLS', MEN'S, BOYS'

APPARENT CANADIAN MARKET

CONTROL NO. 32.1

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	4,998	4,994	4,858	5,595	6,076
Less Exports ⁽¹⁾	<u>424</u>	<u>398</u>	<u>266</u>	<u>273</u>	<u>264</u>
Net Domestic Shipments	4,574	4,596	4,592	5,322	5,812
Imports ⁽¹²⁾	<u>1,795</u>	<u>3,501</u>	<u>1,541</u>	<u>1,363</u>	<u>2,577</u>
Apparent Canadian Market	6,369	8,097	6,133	6,685	8,389

Share of Market held by

--- percent ---

Net Domestic Shipments	72	57	75	80	69
Imports	28	43	25	20	31

OUTERWEAR - WOMEN'S,
GIRLS', MEN'S, BOYS'

IMPORTS

CONTROL NO. 32.1

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>					
	--- '000 garments ---				
Korea, R. of		2,415	1,131	912	1,606
Hong Kong		577	260	266	353
China, P. R. of		61	5	5	280
Taiwan		282	56	36	44
Singapore		1	-	21	33
Thailand		-	neg	13	27
Romania		29	neg	-	25
Philippines		32	25	-	20
Macao		-	-	neg	13
Bulgaria		-	-	-	-
Total Restrained	-	3,397	1,477	1,253	2,401
<u>UNRESTRAINED LOW-COST</u>					
Leew-Wind		-	-	-	11
Mexico		-	-	neg	2
Ecuador		-	-	1	2
Czechoslovakia		-	-	-	2
Barbados		-	-	1	1
Uruguay		-	-	-	1
India		neg	-	1	neg
Bolivia		-	-	-	neg
Afganistan		-	-	-	neg
Columbia		-	-	-	neg
Peru		-	-	-	neg
Brazil		18	2	-	neg
Guatemala		-	-	-	neg
Algeria		-	-	-	neg
Malaysia		-	-	-	neg
Total Unrestrained Low-Cost	-	18	2	3	19

(Continued)

OUTERWEAR - WOMEN'S,
GIRLS', MEN'S, BOYS'

IMPORTS

CONTROL NO. 32.1

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.		20	12	15	59
France		1	11	23	42
Austria		1	1	14	15
Italy		9	9	-	12
Switzerland		1	1	11	10
United Kingdom		3	4	3	7
Germany, West		3	4	4	2
Norway		-	-	neg	1
Finland		1	1	1	1
Iceland		-	-	9	1
Ireland		-	-	neg	1
Sweden		neg	neg	neg	neg
Netherlands		-	-	-	neg
Japan		41	18	23	neg
New Zealand		3	neg	-	neg
Belgium		-	-	neg	neg
Denmark		-	neg	1	neg
South Africa		-	neg	-	-
Total Developed	-	83	61	104	151
<u>OTHER</u>					
Yugoslavia		-	-	-	2
Spain		-	-	1	2
Israel		neg	1	-	neg
Portugal		neg	-	-	-
Total Other	-	neg	1	1	4
*Not available.					
TOTAL ALL SOURCES	-	3,501	1,541	1,363	2,577

Totals may not add due to rounding.

OUTERWEAR - CHILDREN'S
AND INFANTS' (0-6x)

APPARENT CANADIAN MARKET

CONTROL NO. 32.2

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	1,294	877	903	847	1,094
Less Exports ⁽¹⁾	<u>27</u>	<u>22</u>	<u>12</u>	<u>9</u>	<u>13</u>
Net Domestic Shipments	1,267	855	891	838	1,081
Imports ⁽¹²⁾	<u>222</u>	<u>413</u>	<u>247</u>	<u>199</u>	<u>491</u>
Apparent Canadian Market	1,489	1,268	1,138	1,037	1,572

Share of Market held by	--- percent ---				
Net Domestic Shipments	85	67	78	81	69
Imports	15	33	22	19	31

OUTERWEAR - CHILDREN'S
AND INFANTS' (0-6x)

IMPORTS

CONTROL NO. 32.2

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>		--- '000 garments ---			
Korea, R. of		201	155	134	175
Hong Kong		175	90	48	171
Philippines		-	-	-	26
Taiwan		26	-	11	4
Singapore		-	-	1	-
China, P. R. of		-	-	-	-
Romania		-	-	-	-
Macao		-	-	-	-
Thailand		-	-	-	-
Bulgaria		-	-	-	-
Total Restrained	-	402	245	194	376
<u>UNRESTRAINED LOW-COST</u>					
Jamaica		-	-	-	1
Ecuador		-	-	-	neg
Brazil		-	-	-	neg
India		-	-	neg	-
Total Unrestrained					
Low-Cost	-	-	-	neg	1

OUTERWEAR - CHILDREN'S
AND INFANTS' (7-6X)

IMPORTS (Continued)

CONTROL NO. 32.2

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>					
		--- '000 garments ---			
France		-	1	1	63
Italy		-	-	neg	11
Japan		9	-	2	4
Austria		-	-	1	1
Finland		-	-	-	1
U.S.A.		2	1	neg	1
Australia		-	-	-	1
United Kingdom		-	-	-	1
Germany, West		-	-	neg	neg
Norway		-	-	neg	neg
Belgium		-	-	-	-
Switzerland		-	neg	neg	-
Denmark		-	-	neg	-
Total Developed	-	11	2	4	83
<u>OTHER</u>					
Spain		-	-	-	25
Portugal		-	-	-	5
Israel		-	-	-	1
Greece		-	-	-	1
Total Other	-	-	-	-	32
TOTAL ALL SOURCES	-	413	247	199	491

*Not available.

Totals may not add due to rounding.

DEFINITION

- a) Pants and Slacks (women's, girls', men's and boys')
Garments that do not extend above the waist but do extend to the knee or below. Included are jodhpurs, knickers, footless tights and gauchos. Garments in this category manufactured of fabric containing 5 percent or more by weight of wool are considered to be woollen garments.
- b) Outer shorts
Same as pants but not extending to the knees.
- c) Overalls and Coveralls
A one-piece garment, as either pants or shorts, but extending above the waist in the form of a bib (or permanently affixed straps) or other structure which partially or fully covers the upper part of the body. One-piece jumpsuits are included in this item.
- d) Children's and Infants' (0-6X)
Pants, Slacks, Shorts, Overalls and Coveralls.
As above but sizes 0-6x.

SECTOR PROFILE

- Based on the latest statistics available (1976), the Canadian industry is comprised of 274 establishments.
- These establishments were primarily located in Québec (63 percent) and Ontario (20 percent).
- Major centres of production in order of importance are Montréal (56 percent), Toronto (16 percent) and Winnipeg (10 percent).

- In 1979, wool pants accounted for 7 percent of total shipments, other pants 72 percent, shorts 3 percent, overalls and coveralls 2 percent and children's and infants' wear 16 percent.
- There are no published data available on total employment in this sector. From a survey of 44 firms, production employees were reported as follows:

<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>
7,596	7,759	7,533	8,534

- Domestic shipments of wool pants and slacks increased by 23 percent in 1979 compared to 1978. This increase is consistent with the increase in structured sportcoats and blazers (Control No. 47.1) reflecting the shift towards casual wear.

PANTS & SLACKS, SHORTS,
OVERALLS & COVERALLS

APPARENT CANADIAN MARKET

CONTROL NO. 37

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	47,189	46,387	52,106	52,792	55,910
Less Exports ⁽¹⁾	<u>770</u>	<u>577</u>	<u>1,075</u>	<u>769</u>	<u>895</u>
Net Domestic Shipments	46,419	45,810	51,031	52,023	55,015
Imports ⁽¹³⁾	<u>27,509</u>	<u>43,203</u>	<u>27,175</u>	<u>23,671</u>	<u>23,365</u>
Apparent Canadian Market	73,928	89,013	78,206	75,694	78,380
	--- percent ---				
Share of Market held by					
Net Domestic Shipments	63	51	65	69	70
Imports	37	49	35	31	30

PANTS & SLACKS, SHORTS,
OVERALLS & COVERALLS

IMPORTS

CONTROL NO. 37

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	Restraint levels <u>1981</u>
<u>RESTRAINED</u>	--- '000 garments ---					
China, P. R. of	3,203	8,492	6,751	5,505	5,833	5,530(5)
Taiwan	6,741	10,755	6,359	5,165	4,735	7,194
Hong Kong	4,089	8,934	4,730	5,941	4,443	5,281
Korea, R. of	3,110	4,023	2,202	2,401	1,302	3,758
Macao	26	115	16	391	198	281
India	24	77	64	64	138	318
Romania	32	89	52	neg	57	53
Thailand	174	30	6	9	51	200(7)
Singapore	53	64	6	2	18	250(3+7)
Bulgaria	-	-	-	-	12	169
Total Restrained	17,452	32,579	20,186	19,478	16,787	23,034(4)

PANTS & SLACKS, SHORTS,
OVERALLS & COVERALLS

IMPORTS (Continued)

CONTROL NO. 37

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
UNRESTRAINED LOW-COST	--- '000 garments ---				
Poland	98	7	4	186	675
Puerto Rico	1,538	2,144	1,721	315	558
Mexico	1,579	1,608	496	490	549
Brazil	639	539	236	191	137
Czechoslovakia	148	150	158	140	116
Philippines	66	37	3	94	90
Leew-Wind	-	-	-	-	89
Hungary	-	-	-	4	25
Pakistan	9	24	35	25	13
Sri Lanka	-	-	-	-	10
Colombia	121	92	-	-	1
El Salvador	-	-	-	-	neg
Ecuador	-	-	-	-	neg
Algeria	-	-	-	-	neg
Panama	81	28	6	5	-
Malaysia	-	-	12	-	-
Uruguay	-	26	3	-	-
Barbados	-	12	2	-	-
North Korea	-	46	1	-	-
Argentina	-	24	1	-	-
Nicaragua	18	7	-	-	-
Viet Nam	194	-	-	-	-
Guatemala	15	-	neg	-	-
Malawi	-	9	-	-	-
Malta	8	8	-	-	-
Indonesia	-	1	-	-	-
Guyana	1	-	-	-	-
Cyprus	-	-	neg	-	-
Morocco	neg	-	-	-	-
Jamaica	neg	-	-	-	-
Haiti	neg	-	-	-	-
Total Unrestrained Low-Cost	4,515	4,762	2,678	1,450	2,263

PANTS & SLACKS, SHORTS,
OVERALLS & COVERALLS

IMPORTS (Continued)

CONTROL NO. 37

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>					
		---	'000 garments	---	
U.S.A.	3,781	4,082	2,946	1,093	2,148
France	158	162	169	304	368
Germany, West	162	393	277	210	320
Italy	30	61	72	96	143
Japan	249	213	83	105	102
United Kingdom	92	62	44	96	69
Austria	19	22	24	20	26
Sweden	9	8	26	47	20
Switzerland	4	5	6	9	19
Netherlands	neg	5	1	neg	7
New Zealand	1	2	neg	3	4
Finland	1	1	2	3	3
South Africa	neg	-	neg	3	1
Australia	13	3	1	1	1
Belgium	133	1	1	neg	1
Norway	9	7	1	2	1
Denmark	5	1	3	neg	neg
Ireland	<u>neg</u>	<u>neg</u>	<u>neg</u>	<u>neg</u>	<u>neg</u>
Total Developed	4,666	5,028	3,656	1,992	3,233
<u>OTHER</u>					
Spain	763	767	641	643	902
Yugoslavia	-	-	-	92	150
Israel	33	57	13	12	24
Portugal	78	7	neg	1	2
Greece	<u>neg</u>	<u>-</u>	<u>1</u>	<u>2</u>	<u>1</u>
Total Other	874	831	655	750	1,079
 TOTAL ALL SOURCES	 27,509	 43,203	 27,175	 23,671	 23,365

Totals may not add due to rounding.

PANTS & SLACKS, - CONTAINING AT LEAST
5% WOOL, WOMEN'S, GIRLS', MEN'S, BOYS'

APPARENT CANADIAN MARKET

CONTROL NO. 37.1

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	2,496	2,957	2,587	2,956	3,629
Less Exports ⁽¹⁾	<u>43</u>	<u>27</u>	<u>54</u>	<u>42</u>	<u>51</u>
Net Domestic Shipments	2,453	2,930	2,533	2,914	3,578
Imports ⁽¹³⁾	<u>60</u>	<u>75</u>	<u>107</u>	<u>97</u>	<u>302</u>
Apparent Canadian Market	2,513	3,005	2,640	3,011	3,880

Share of Market held by	--- percent ---				
Net Domestic Shipments	98	98	96	97	92
Imports	2	2	4	3	8

PANTS & SLACKS - CONTAINING AT LEAST,
5% WOOL, WOMEN'S, GIRLS', MEN'S, BOYS'

IMPORTS

CONTROL NO. 37.1

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
China, P. R. of	-	9	16	-	67
India	-	-	11	18	18
Bulgaria	-	-	-	-	12
Hong Kong	1	neg	1	4	8
Korea, R. of	28	35	61	11	4
Taiwan	-	-	neg	-	-
Singapore	-	-	-	-	-
Thailand	-	-	-	-	-
Macao	-	-	-	-	-
Romania	-	-	-	-	-
Total Restrained	29	44	89	33	109
<u>UNRESTRAINED LOW-COST</u>					
Poland	neg	2	2	13	153
Philippines	-	-	-	-	3
Colombia	neg	-	-	-	1
Algeria	-	-	-	-	neg
Hungary	-	-	-	4	-
Czechoslovakia	6	-	-	-	-
Uruguay	-	neg	neg	-	-
Total Unrestrained Low-Cost	6	4	2	17	157

PANTS & SLACKS - CONTAINING AT LEAST
5% WOOL, WOMEN'S, GIRLS', MEN'S, BOYS'

IMPORTS (Continued)

CONTROL NO. 37.1

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>			--- '000 garments ---		
Italy	2	4	5	9	12
U.S.A.	3	5	4	5	7
France	12	5	5	9	6
United Kingdom	2	2	2	3	3
Austria	2	7	neg	2	1
Germany, West	2	1	1	1	1
Belgium	-	neg	-	-	1
Sweden	neg	-	neg	17	1
Switzerland	neg	neg	-	neg	neg
Finland	-	-	-	-	neg
Netherlands	-	-	-	neg	neg
Norway	-	-	-	neg	neg
Japan	-	neg	-	neg	neg
Denmark	<u>neg</u>	<u>-</u>	<u>neg</u>	<u>-</u>	<u>neg</u>
Total Developed	23	24	17	46	32
<u>OTHER</u>					
Spain	neg	-	-	-	4
Portugal	neg	1	-	neg	neg
Israel	-	-	-	-	neg
Yugoslavia	<u>-</u>	<u>-</u>	<u>-</u>	<u>neg</u>	<u>-</u>
Total Other	neg	1	-	neg	4
TOTAL ALL SOURCES	60	75	107	97	302

Totals may not add due to rounding.

PANTS AND SLACKS - ALL OTHER,
WOMEN'S, GIRLS', MEN'S, BOYS'

APPARENT CANADIAN MARKET

CONTROL NO. 37.2

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	32,772	32,747	37,173	38,611	40,020
Less Exports ⁽¹⁾	<u>560</u>	<u>302</u>	<u>775</u>	<u>544</u>	<u>558</u>
Net Domestic Shipments	32,212	32,445	36,398	38,067	39,462
Imports ⁽¹³⁾	<u>21,483</u>	<u>33,601</u>	<u>20,133</u>	<u>15,530</u>	<u>15,443</u>
Apparent Canadian Market	53,695	66,046	56,531	53,597	54,905

Share of Market held by	--- percent ---				
Net Domestic Shipments	60	49	64	71	72
Imports	40	51	36	29	28

PANTS AND SLACKS - ALL OTHER,
WOMEN'S, GIRLS', MEN'S, BOYS'

IMPORTS

CONTROL NO. 37.2

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>			--- '000 garments ---		
China, P.R. of		6,704	5,112	3,825	3,817
Hong Kong		6,625	3,164	3,952	2,963
Taiwan		7,601	3,817	2,527	2,656
Korea, R. of		3,104	1,790	1,767	1,123
Macao		115	1	386	142
India		77	39	41	84
Romania		83	52	neg	57
Thailand		30	5	6	8 (7)
Singapore		19	neg	-	3 (3+7)
Bulgaria		-	-	-	-
Total Restrained	-	24,358	13,980	12,504	10,853
<u>UNRESTRAINED LOW-COST</u>					
Puerto Rico		2,144	1,721	315	558
Mexico		1,549	495	488	537
Poland		3	3	104	416
Brazil		539	236	191	111
Czechoslovakia		123	132	114	109
Leew-Wind		-	-	-	24
Pakistan		24	35	25	13
Hungary		-	-	-	1
Philippines		37	1	2	1
El Salvador		-	-	-	neg
Ecuador		-	-	-	neg
Algeria		-	-	-	neg
Panama		28	6	5	-
Uruguay		26	2	-	-
Barbados		12	2	-	-
Argentina		24	1	-	-
North Korea		46	1	-	-
Colombia		87	-	-	-
Malawi		9	-	-	-
Malta		8	-	-	-
Nicaragua		7	-	-	-
Indonesia		1	-	-	-
Cyprus		-	neg	-	-
Guatemala		-	neg	-	-
Total Unrestrained Low-Cost	-	4,667	2,635	1,244	1,770

PANTS AND SLACKS - ALL OTHER,
WOMEN'S, GIRLS', MEN'S, BOYS'

IMPORTS (Continued)

CONTROL NO. 37.2

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>					
			--- '000 garments ---		
U.S.A.		3,310	2,519	712	1,464
France		148	149	199	233
Italy		33	43	64	91
United Kingdom		36	29	37	30
Japan		162	49	41	29
Germany, West		25	46	38	21
Austria		14	18	7	17
Switzerland		4	6	8	17
Sweden		7	8	28	14
Finland		1	1	3	2
Netherlands		5	1	-	2
New Zealand		-	neg	1	1
South Africa		-	neg	3	1
Australia		3	-	neg	1
Norway		7	1	1	1
Ireland		neg	neg	neg	neg
Denmark		1	2	neg	neg
Belgium		<u>1</u>	<u>1</u>	<u>neg</u>	<u>neg</u>
Total Developed	-	3,757	2,873	1,142	1,924
<u>OTHER</u>					
Spain		758	637	639	888
Israel		54	6	1	5
Portugal		6	neg	neg	1
Greece		-	1	neg	neg
Yugoslavia		<u>-</u>	<u>-</u>	<u>neg</u>	<u>-</u>
Total Other	-	818	644	640	894
TOTAL ALL SOURCES	-	33,601	20,133	15,530	15,443

*Not available.

Totals may not add due to rounding.

SHORTS - WOMEN'S,
GIRLS', MEN'S, BOYS'

APPARENT CANADIAN MARKET

CONTROL NO. 37.3

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	3,908	2,889	2,446	2,545	1,907
Less Exports ⁽¹⁾	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>
Net Domestic Shipments	3,908	2,889	2,446	2,545	1,907
Imports ⁽¹³⁾	<u>3,688</u>	<u>6,270</u>	<u>4,114</u>	<u>3,329</u>	<u>3,470</u>
Apparent Canadian Market	7,596	9,159	6,560	5,874	5,377
	--- percent ---				
Share of Market held by					
Net Domestic Shipments	51	32	37	43	35
Imports	49	68	63	57	65

SHORTS - WOMEN'S, GIRLS', MEN'S, BOYS'

IMPORTS

CONTROL NO. 37.3

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
Taiwan	2,354	1,853	1,227	1,195	
China, P. R. of	1,078	732	425	708	
Hong Kong	1,477	815	818	479	
Korea, R. of	724	340	394	155	
India	-	14	2	34	
Thailand	neg	1	3	26 (7)	
Macao	-	-	-	19	
Singapore	46	5	neg	12 (3+7)	
Romania	7	-	neg	-	
Bulgaria	-	-	-	-	
Total Restrained	-	5,686	3,760	2,869	2,628
<u>UNRESTRAINED LOW-COST</u>					
Leew-Wind	-	-	-	65	
Poland	-	-	69	58	
Hungary	-	-	-	24	
Brazil	-	-	-	15	
Mexico	54	1	1	6	
Philippines	-	-	-	2	
Malaysia	-	12	-	-	
Czechoslovakia	11	-	-	-	
Colombia	5	-	-	-	
Pakistan	-	neg	-	-	
Total Unrestrained					
Low-Cost	-	70	13	70	170

SHORTS - WOMEN'S, GIRLS', MEN'S, BOYS'

IMPORTS (Continued)

CONTROL NO. 37.3

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>		--- '000 garments ---			
Germany, West		366	229	160	240
U.S.A.		51	28	53	180
United Kingdom		22	12	45	26
Italy		19	14	10	24
Japan		39	28	7	23
France		3	3	11	18
Austria		neg	1	5	4
New Zealand		2	-	3	2
Sweden		1	18	neg	1
Netherlands		-	neg	-	neg
Australia		-	1	1	-
Denmark		neg	1	neg	-
Norway		<u>neg</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Developed	-	503	335	295	518
<u>OTHER</u>					
Yugoslavia		-	-	91	150
Spain		9	3	2	-
Portugal		-	-	-	neg
Israel		<u>1</u>	<u>neg</u>	<u>-</u>	<u>-</u>
Total Other	-	10	3	93	150
 TOTAL ALL SOURCES	 -	 6,270	 4,114	 3,329	 3,470

*Not available.

Totals may not add due to rounding.

OVERALLS, & COVERALLS - WOMEN'S,
GIRLS', MEN'S AND BOYS'

APPARENT CANADIAN MARKET

CONTROL NO. 37.4

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	2,342	1,418	1,415	1,372	1,324
Less Exports ⁽¹⁾	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>
Net Domestic Shipments	2,342	1,418	1,415	1,372	1,324
Imports ⁽¹³⁾	<u>830</u>	<u>1,421</u>	<u>1,077</u>	<u>598</u>	<u>851</u>
Apparent Canadian Market	3,172	2,839	2,492	1,970	2,175
Share of Market held by	--- percent ---				
Net Domestic Shipments	74	50	57	70	61
Imports	26	50	43	30	39

OVERALLS & COVERALLS - WOMEN'S,
GIRLS', MEN'S & BOYS'

IMPORTS

CONTROL NO. 37.4

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>			--- '000 garments ---		
China, P.R. of		478	369	246	535
Hong Kong		326	372	107	91
Taiwan		183	174	138	3
India		-	neg	2	1
Korea, R. of		17	1	-	-
Romania		-	-	-	-
Macao		-	-	-	-
Thailand		-	-	-	-
Bulgaria		-	-	-	-
Singapore		-	-	-	-
Total Restrained	-	1,004	916	493	630
<u>UNRESTRAINED LOW-COST</u>					
Mexico		5	-	-	1
Philippines		-	1	1	-
Pakistan		-	neg	-	-
Total Unrestrained Low-Cost	-	5	1	1	1

OVERALLS & COVERALLS - WOMEN'S
GIRLS', MEN'S & BOYS'

IMPORTS (Continued)

CONTROL NO. 37.4

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>			---	'000 garments	---
U.S.A.		406	157	92	207
United Kingdom		1	1	10	9
France		1	neg	2	2
Italy		neg	neg	neg	1
Austria		-	neg	-	neg
Sweden		neg	neg	neg	neg
Norway		-	-	neg	neg
Finland		-	-	-	neg
Japan		3	neg	-	neg
Germany, West		-	neg	neg	-
Total Developed		411	158	104	219
<u>OTHER</u>	-	-	-	-	-
TOTAL ALL SOURCES	-	1,421	1,077	598	851

*Not available.

Totals may not add due to rounding.

PANTS, SLACKS, SHORTS, OVERALLS,
COVERALLS - CHILDREN'S AND INFANTS' (0-6x)

APPARENT CANADIAN MARKET

CONTROL NO. 37.5

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	5,671	6,376	8,485	7,308	9,030
Less Exports ⁽¹⁾	<u>167</u>	<u>248</u>	<u>246</u>	<u>183</u>	<u>286</u>
Net Domestic Shipments	5,504	6,128	8,239	7,125	8,744
Imports ⁽¹³⁾	<u>1,448</u>	<u>1,837</u>	<u>1,745</u>	<u>4,117</u>	<u>3,299</u>
Apparent Canadian Market	6,952	7,965	9,984	11,242	12,043
Share of Market held by	--- percent ---				
Net Domestic Shipments	79	77	83	63	73
Imports	21	23	17	37	27

PANTS, SLACKS, SHORTS, OVERALLS
COVERALLS - CHILDREN'S AND INFANTS' (0-6x)

IMPORTS

CONTROL NO. 37.5

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>					
		--- '000 garments ---			
Hong Kong		505	377	1,060	902
Taiwan		618	516	1,273	880
China, P.R. of		223	522	1,009	705
Macao		-	14	6	37
Korea, R. of		144	11	229	21
Thailand		-	-	-	16 (7)
Singapore		-	-	2	3(3+7)
Romania		-	-	-	neg
Bulgaria		-	-	-	-
India		-	-	-	-
Total Restrained	-	1,490	1,440	3,579	2,564
<u>UNRESTRAINED LOW-COST</u>					
Philippines		-	neg	91	83
Poland		-	-	-	49
Brazil		-	-	-	12
Sri Lanka		-	-	-	10
Czechoslovakia		16	26	26	7
Mexico		-	-	1	5
Total Unrestrained					
Low-Cost	-	16	26	118	166

PANTS, SLACKS, SHORTS, OVERALLS
COVERALLS - CHILDREN'S AND INFANTS' (0-6x)

IMPORTS (Continued)

CONTROL NO. 37.5

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>			---	'000 garments	---
U.S.A.		309	238	231	291
France		5	12	83	109
Germany, West		1	1	11	58
Japan		9	6	56	50
Italy		5	10	14	15
Netherlands		-	-	neg	5
Sweden		-	-	2	4
Austria		1	5	6	3
United Kingdom		1	neg	1	2
Switzerland		-	-	1	2
Denmark		-	-	-	neg
Finland		-	neg	1	-
Belgium		-	neg	-	-
Total Developed	-	331	272	406	539
<u>OTHER</u>					
Israel		1	6	11	18
Spain		-	neg	2	10
Portugal		-	-	1	1
Greece		-	-	1	1
Total Other	-	1	6	15	30
TOTAL ALL SOURCES	-	1,837	1,745	4,117	3,299

*Not available.

Totals may not add due to rounding.

DEFINITION

This industry is comprised of three sectors:

- a) structured sportcoats and blazers
- b) structured suits
- c) unstructured suits

The structured suit-jacket, sportcoat or blazer must contain at least two of the following three elements or their equivalents:

- 1) lining
- 2) shoulder padding
- 3) front stiffening

Suits which do not contain at least two of the three elements or their equivalents are considered to be unstructured suits.

SECTOR PROFILE

- Based on the latest statistics available (1976), the Canadian men's and boys' suit, sportcoat and blazer industry is comprised of 93 establishments.
- These establishments were primarily located in Québec (68 percent), Ontario (15 percent), Manitoba (6 percent) and British Columbia (5 percent).
- Major centres of production in order of importance are Montréal (63 percent), Toronto (12 percent) and Winnipeg (6 percent).
- In 1979, structured suits accounted for 61 percent of shipments, sportcoats and blazers 33 percent, and unstructured suits only 6 percent in unit terms.

- There are no published data available on total employment in this sector. The Textile and Clothing Board inquiry of May 14, 1975 determined that the numbers of employees in the men's fine clothing industry in 1974 was as follows: Québec 8,663, Ontario 2,809, other provinces 500 for a total of 11,972.
- Shipments of structured sportcoats and blazers (Control No. 47.1) increased by 33 percent in 1979 compared to 1978. This increase is consistent with the shift in fashion to more casual wear, and follows two years of below average shipments. 1979 shipments are still below 1975 levels. Structured suits (Control No. 47.2) showed zero growth and unstructured suits (Control No. 38) declined by 19 percent.

UNSTRUCTURED SUITS - STRUCTURED
SPORTCOATS & BLAZERS, STRUCTURED SUITS

APPARENT CANADIAN MARKET

CONTROL NOS. 38, 47

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	4,166	4,229	4,203	3,726	3,991
Less Exports ⁽¹⁾	<u>148</u>	<u>158</u>	<u>108</u>	<u>79</u>	<u>62</u>
Net Domestic Shipments	4,018	4,071	4,095	3,647	3,929
Imports ⁽⁸⁾	<u>1,107</u>	<u>1,730</u>	<u>1,140</u>	<u>1,061</u>	<u>1,343</u>
Apparent Canadian Market	5,125	5,801	5,235	4,708	5,272

Share of Market held by

--- percent ---

Net Domestic Shipments	78	70	78	77	75
Imports	22	30	22	23	25

UNSTRUCTURED SUITS - STRUCTURED
SPORTCOATS & BLAZERS, STRUCTURED SUITS

IMPORTS

CONTROL NO. 38, 47

SOURCE	1975	1976	1977	1978	1979	Restraint levels 1981
--- '000 garments ---						
<u>RESTRAINED</u>						
Korea, R. of	414	574	449	429	320	547
Taiwan	273	687	297	289	224	673
Poland	37	3	21	67	152	42
Romania	68	85	47	-	62	75
Hong Kong	106	129	73	47	58	490
Hungary	8	11	8	28	40	27 (14)
Bulgaria	-	-	-	-	37	19 (14)
Philippines	6	7	1	1	32	21 (11)
Macao	-	-	-	-	7	19
China, P. R. of	12	6	2	-	2	20 (5)
Singapore	1	15	1	neg	1	22 (3)
Total Restrained	925	1,517	899	861	935	1,955 (4)
<u>UNRESTRAINED LOW-COST</u>						
China, P. R. of	-	10	6	3	72	
Romania	-	8	-	-	40	
Poland	-	-	-	4	37	
Hungary	-	neg	neg	1	20	
Czechoslovakia	15	24	17	13	16	
India	neg	1	neg	1	10	
Colombia	8	10	9	-	9	
Sri Lanka	-	-	-	-	8	
Singapore	-	-	2	-	5	
Philippines	-	-	-	6	5	
Uruguay	-	neg	-	neg	1	
Brazil	7	10	-	-	neg	
Korea, North	-	-	3	-	-	
Malaysia	1	neg	neg	-	-	
Panama	4	-	-	-	-	
El Salvador	1	-	-	-	-	
Turkey	neg	neg	-	-	-	
Morocco	neg	neg	-	-	-	
Thailand	neg	neg	-	-	-	
Pakistan	neg	neg	-	-	-	
Virgin Islands	-	-	neg	-	-	
Argentina	-	neg	-	-	-	
Iran	neg	-	-	-	-	
Total Unrestrained Low-Cost	36	63	37	28	223	

UNSTRUCTURED SUITS - STRUCTURED
SPORTCOATS & BLAZERS, STRUCTURED SUITS

IMPORTS (Continued)

CONTROL NO. 38, 47

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
Italy	20	23	28	49	63
France	55	41	35	48	55
U.S.A.	13	16	21	43	39
United Kingdom	13	16	9	10	8
Sweden	2	4	3	6	6
Germany, West	4	7	2	3	3
Ireland	1	1	neg	neg	3
Belgium	3	4	2	1	2
Iceland	1	2	1	neg	1
Finland	neg	neg	neg	neg	1
Netherlands	neg	2	neg	neg	1
South Africa	3	4	4	7	1
Japan	6	13	88	2	1
Switzerland	2	1	1	1	1
Austria	3	1	1	1	neg
Denmark	neg	neg	neg	neg	neg
Norway	2	1	2	neg	-
Australia	-	-	neg	-	-
Total Developed	128	136	197	171	185
<u>OTHER</u>					
Spain	2	2	neg	1	1
Yugoslavia	11	6	4	neg	1
Greece	1	1	1	-	neg
Portugal	neg	1	neg	neg	neg
Israel	3	4	neg	neg	-
Total Other	17	14	5	1	2
 TOTAL ALL SOURCES	 1,107	 1,730	 1,140	 1,061	 1,343

Totals may not add due to rounding.

UNSTRUCTURED SUITS

APPARENT CANADIAN MARKET

CONTROL NO. 38

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	424	524	372	298	240
Less Exports ⁽¹⁾	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>
Net Domestic Shipments	424	524	372	298	240
Imports ⁽⁸⁾	<u>538</u>	<u>924</u>	<u>600</u>	<u>384</u>	<u>478</u>
Apparent Canadian Market	962	1,448	972	682	718
	--- percent ---				
Share of Market held by					
Net Domestic Shipments	44	36	38	44	33
Imports	56	64	62	56	67

UNSTRUCTURED SUITS

IMPORTS

CONTROL NO. 38

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>					
	--- '000 garments ---				
Taiwan	212	572	247	140	130
Korea, R. of	212	232	200	152	73
Hong Kong	82	50	50	27	27
Macao	-	-	-	-	4
Total Restrained	506	854	497	319	234
<u>UNRESTRAINED LOW-COST</u>					
China, P. R. of	-	10	6	3	72
Romania	-	8	-	-	40
Poland	-	-	-	4	37
Hungary	-	neg	neg	1	20
Philippines	-	-	-	6	5
Singapore	-	-	2	-	5
Czechoslovakia	-	-	-	-	2
India	neg	neg	neg	neg	2
Colombia	-	2	-	-	neg
Korea, North	-	-	2	-	-
Total Unrestrained					
Low-Cost	neg	20	10	14	183

UNSTRUCTURED SUITS

IMPORTS (Continued)

CONTROL NO. 38

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
Italy	11	11	15	23	23
U.S.A.	5	10	9	11	17
France	10	14	10	10	9
Sweden	1	1	1	neg	5
United Kingdom	2	3	3	3	3
Germany, West	-	1	neg	neg	1
Belgium	1	2	1	neg	1
Switzerland	neg	neg	neg	neg	neg
Austria	neg	neg	neg	neg	neg
Ireland	neg	neg	neg	neg	neg
South Africa	1	2	1	1	neg
Finland	neg	neg	-	-	neg
Japan	-	2	50	neg	-
Norway	1	1	1	neg	-
Netherlands	neg	neg	-	neg	-
Denmark	<u>neg</u>	<u>neg</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Developed	32	47	91	48	59
<u>OTHER</u>					
Greece	neg	1	1	-	neg
Spain	neg	neg	-	-	neg
Portugal	<u>neg</u>	<u>neg</u>	<u>neg</u>	<u>neg</u>	<u>-</u>
Total Other	-	1	1	-	-
TOTAL ALL SOURCES	538	924	600	384	478

Totals may not add due to rounding.

STRUCTURED SPORTCOATS, BLAZERS
AND STRUCTURED SUITS

APPARENT CANADIAN MARKET

CONTROL NO. 47

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	3,742	3,705	3,831	3,428	3,751
Less Exports ⁽¹⁾	<u>148</u>	<u>158</u>	<u>108</u>	<u>79</u>	<u>62</u>
Net Domestic Shipments	3,594	3,547	3,723	3,349	3,689
Imports ⁽⁸⁾	<u>569</u>	<u>807</u>	<u>540</u>	<u>677</u>	<u>865</u>
Apparent Canadian Market	4,163	4,354	4,263	4,026	4,554
Share of Market held by	--- percent ---				
Net Domestic Shipments	86	81	87	83	81
Imports	14	19	13	17	19

STRUCTURED SPORTCOATS & BLAZERS
- MEN'S AND BOYS'

APPARENT CANADIAN MARKET

CONTROL NO. 47.1

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	1,354	1,441	1,294	1,000	1,333
Less Exports ⁽¹⁾	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>
Net Domestic Shipments	1,354	1,441	1,294	1,000	1,333
Imports ⁽⁸⁾	<u>124</u>	<u>163</u>	<u>160</u>	<u>203</u>	<u>292</u>
Apparent Canadian Market	1,478	1,604	1,454	1,203	1,625

Share of Market held by

--- percent ---

Net Domestic Shipments	92	90	89	83	82
Imports	8	10	11	17	18

STRUCTURED SPORTCOATS & BLAZERS
- MEN'S AND BOYS'

IMPORTS

CONTROL NO. 47.1

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
Korea, R. of	32	36	74	40	77
Philippines	-	-	-	-	27
Bulgaria	-	-	-	-	26
Poland	-	-	neg	10	25
Hong Kong	12	13	3	10	16
Taiwan	33	55	14	51	13
Hungary	2	2	2	6	6
China, P.R. of	-	-	-	-	2
Singapore	1	1	1	neg	1
Macao	-	-	-	-	1
Romania	<u>14</u>	<u>10</u>	<u>7</u>	<u>-</u>	<u>-</u>
Total Restrained	94	117	101	117	194
<u>UNRESTRAINED LOW-COST</u>					
Sri Lanka	-	-	-	-	8
India	neg	neg	neg	neg	8
Czechoslovakia	6	15	15	10	7
Colombia	-	-	-	-	5
Uruguay	-	neg	-	-	1
Turkey	neg	neg	-	-	-
Pakistan	-	neg	-	-	-
Brazil	-	neg	-	-	-
El Salvador	1	-	-	-	-
Panama	<u>4</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Unrestrained					
Low-Cost	11	15	15	10	29

(Continued)

STRUCTURED SPORTCOATS & BLAZERS
- MEN'S AND BOYS'

IMPORTS (Continued)

CONTROL NO. 47.1

<u>SOURCES</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
France	2	2	8	19	23
Italy	2	3	5	14	19
U.S.A.	2	2	9	28	16
United Kingdom	2	2	3	4	3
Ireland	neg	neg	neg	neg	3
Germany, West	neg	2	1	2	2
Belgium	neg	neg	neg	neg	1
Finland	neg	neg	-	neg	1
Iceland	1	2	1	neg	1
Netherlands	neg	neg	neg	-	1
Japan	6	10	12	2	1
Austria	-	-	-	neg	neg
Denmark	neg	neg	-	-	neg
Sweden	neg	1	1	3	neg
Switzerland	neg	neg	neg	neg	neg
South Africa	2	3	2	2	neg
Australia	-	-	neg	-	-
Total Developed	17	27	42	74	71
<u>OTHER</u>					
Greece	-	-	-	-	neg
Portugal	-	-	-	-	neg
Yugoslavia	neg	1	1	-	neg
Spain	neg	neg	-	1	-
Israel	neg	1	neg	-	-
Total Other	neg	2	1	1	neg
TOTAL ALL SOURCES	124	163	160	203	292

Totals may not add due to rounding.

STRUCTURED SUITS,
- MEN'S AND BOYS'

APPARENT CANADIAN MARKET

CONTROL NO. 47.2

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	2,388	2,264	2,537	2,428	2,418
Less Exports ⁽¹⁾	<u>148</u>	<u>158</u>	<u>108</u>	<u>79</u>	<u>62</u>
Net Domestic Shipments	2,240	2,106	2,429	2,349	2,356
Imports ⁽⁸⁾	<u>445</u>	<u>644</u>	<u>380</u>	<u>474</u>	<u>573</u>
Apparent Canadian Market	2,685	2,750	2,809	2,823	2,929
Share of Market held by	--- percent ---				
Net Domestic Shipments	83	77	86	83	80
Imports	17	23	14	17	20

STRUCTURED SUITS
- MEN'S AND BOYS'

IMPORTS

CONTROL NO. 47.2

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
Korea, R. of	170	306	175	238	170
Poland	37	3	20	57	127
Taiwan	28	60	36	97	81
Romania	54	75	40	-	62
Hungary	7	9	6	22	34
Hong Kong	12	66	20	10	15
Bulgaria	-	-	-	-	12
Philippines	6	7	1	1	5
Macao	-	-	-	-	2
Singapore	neg	14	-	-	-
China, P.R. of	<u>12</u>	<u>6</u>	<u>2</u>	<u>-</u>	<u>-</u>
Total Restrained	326	546	300	425	508
<u>UNRESTRAINED LOW-COST</u>					
Czechoslovakia	9	9	2	3	7
Colombia	8	8	9	-	4
Brazil	7	10	-	-	neg
Uruguay	-	neg	-	neg	neg
Iran	neg	-	-	-	-
Morocco	neg	neg	-	-	-
India	neg	neg	neg	neg	-
Malaysia	1	neg	neg	-	-
Pakistan	neg	-	-	-	-
Korea, North	-	-	1	-	-
Thailand	neg	neg	-	-	-
Argentina	-	neg	-	-	-
Ecuador	-	neg	-	-	-
Virgin Islands	-	-	neg	-	-
Other	<u>-</u>	<u>neg</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Unrestrained					
Low-Cost	25	27	12	3	11

(Continued)

STRUCTURED SUITS,
- MEN'S AND BOYS'

IMPORTS (Continued)

CONTROL NO. 47.2

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
France	43	25	17	19	24
Italy	8	9	8	12	21
U.S.A.	6	4	3	4	6
United Kingdom	8	10	3	3	2
Sweden	1	2	1	2	1
Ireland	neg	neg	neg	neg	neg
Belgium	2	2	1	1	neg
Finland	neg	neg	neg	-	neg
Germany, West	4	4	1	1	neg
Netherlands	neg	1	-	-	neg
Switzerland	1	neg	neg	neg	neg
South Africa	neg	neg	1	4	neg
Japan	1	1	26	-	neg
Austria	3	1	1	neg	-
Denmark	neg	neg	neg	neg	-
Norway	<u>1</u>	<u>neg</u>	<u>1</u>	<u>neg</u>	<u>-</u>
Total Developed	78	59	63	46	54
<u>OTHER</u>					
Yugoslavia	10	5	3	neg	1
Portugal	neg	1	neg	neg	neg
Spain	2	1	neg	neg	neg
Greece	neg	neg	-	-	-
Israel	<u>2</u>	<u>3</u>	<u>neg</u>	<u>neg</u>	<u>-</u>
Total Other	14	10	3	neg	1
TOTAL ALL SOURCES	445	644	380	474	573

Totals may not add due to rounding.

DEFINITION

39.1 BLOUSES AND SHIRTS (Women's, Girls')

Garments covering the upper part of the body whether knitted or woven, excluding underwear, jackets, T-shirts, sweatshirts, and sweaters.

(Note: Men's and boys' shirts are contained in Control No. 49).

39.2 T-SHIRTS (Women's, Girls', Men's, Boys')

A knitted garment covering the upper part of the body, of construction 19 cut or finer, i.e. 19 or more vertical stitches per inch.

39.3 SWEATSHIRTS (Women's, Girls', Men's, Boys')

A garment covering the upper part of the body, at least one side of which is brushed or fleeced.

Note: The definition of T-shirts, and sweatshirts for men and boys are subject to the overriding definition of men's or boys' shirts with tailored or full-fashioned collar (See Control Item No. 49).

39.4 BLOUSES AND SHIRTS, T-SHIRTS, SWEATSHIRTS, CHILDREN'S AND INFANTS' (0-6x)

As defined above.

SECTOR PROFILE

- Based on the latest statistics available (1976) the Canadian industry producing apparel defined in Control No. 39 consists of 148 establishments.
- Based on establishments reporting production of this range in 1976 the regional distribution was:

103	Québec:	70%
32	Ontario:	22%
13	Other:	8%

- Domestic shipments of blouses (Control 39.1) increased by 5.6 percent in 1979 over 1978, but are still 36 percent below 1975 levels.
- The rate of increase of domestic shipments of T-shirts (Control No. 39.2) decreased in 1979. At 10 percent, the rate of increase was one-half the 1975-1979 yearly average of 20 percent.
- Despite a 19 percent increase in domestic shipments of sweat-shirts (Control No. 39.3) in 1979 over 1978, 1979 shipments are still below 1975 levels.

BLOUSES & SHIRTS -
T-SHIRTS, SWEATSHIRTS

APPARENT CANADIAN MARKET

CONTROL NO. 39

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	46,324	38,136	40,419	42,139	45,165
Less Exports ⁽¹⁾	<u>83</u>	<u>89</u>	<u>109</u>	<u>99</u>	<u>122</u>
Net Domestic Shipments	46,241	38,047	40,310	42,040	45,043
Imports ⁽⁸⁾	<u>57,219</u>	<u>77,247</u>	<u>52,892</u>	<u>57,531</u>	<u>54,262</u>
Apparent Canadian Market	103,460	115,294	93,202	99,571	99,305
	--- percent ---				
Share of Market held by					
Net Domestic Shipments	45	33	43	42	45
Imports	55	67	57	58	55

BLOUSES & SHIRTS - T-SHIRTS, SWEATSHIRTS

IMPORTS

CONTROL NO. 39

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	Restraint levels <u>1981</u>
<u>RESTRAINED</u>			--- '000 garments ---			
Taiwan	19,761	28,631	15,066	18,899	18,361	20,890
Hong Kong	9,207	13,140	11,862	13,687	11,036	10,878
Korea, R. of	7,781	9,842	10,377	10,610	7,337	9,662
China, P. R. of	3,572	6,583	4,719	4,288	5,142	5,377(5)
India	2,361	4,442	1,786	1,395	2,306	3,286(19)
Malaysia	913	853	402	397	674	708
Poland	401	1,120	1,367	1,940	657	655
Singapore	518	246	59	82	596(1)	955(3+19)
Romania	492	723	120	163	508	681
Philippines	226	356	219	144	475	191(15+16)
Thailand	62	94	6	49	164	424(19)
Macao	12	18	50	99	111	224(19)
Bulgaria	-	-	-	neg	-	135
Total Restrained	45,306	66,048	46,033	51,753	47,367	54,066(4+20)

(Continued)

BLOUSES & SHIRTS - T-SHIRTS, SWEATSHIRTS

IMPORTS (Continued)

CONTROL NO. 39

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>UNRESTRAINED LOW-COST</u>	--- '000 garments ---				
Pakistan	4,930	4,013	1,787	1,055	890
Poland	145	211	140	342	778
Romania	-	18	18	39	300
Indonesia	5	1	neg	neg	265
Hungary	8	-	34	136	209
Brazil	1,608	1,320	255	101	57
Morocco	176	147	92	25	54
El Salvador	27	-	1	27	48
Sri Lanka	-	-	35	3	43
Haiti	-	-	-	-	39
Honduras	-	-	-	-	26
Turkey	13	61	22	-	14
Malta	1	-	neg	neg	11
Mexico	131	56	4	7	8
Afghanistan	7	1	10	7	6
Jamaica	5	-	-	neg	2
Korea, North	6	14	11	-	1
Malaysia	-	143	5	-	neg
Cyprus	2	-	2	1	neg
Ecuador	1	1	1	neg	neg
Peru	-	-	-	-	neg
Guatemala	2	2	neg	1	neg
Bulgaria	-	-	-	-	-
U.S.S.R.	2	-	-	-	-
Iran	neg	-	-	-	-
Mauritius	10	1	-	-	-
Guyana	-	-	neg	-	-
Argentina	neg	-	-	-	-
Colombia	127	217	17	1	-
Uruguay	neg	-	-	-	-
Barbados	-	19	38	177	-
Trinidad	3	-	-	-	-
Other	2	-	-	1	1
Total Unrestrained Low-Cost	7,212	6,225	2,472	1,923	2,752

(Continued)

BLOUSES & SHIRTS - T-SHIRTS, SWEATSHIRTS

IMPORTS (Continued)

CONTROL NO. 39

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.	1,781	2,535	1,567	1,779	1,885
Italy	416	400	547	522	615
France	357	351	391	580	540
Japan	630	846	1,376	488	465
United Kingdom	177	181	134	113	104
Germany, West	29	29	67	64	53
Finland	11	3	3	7	43
Austria	39	4	12	11	35
Netherlands	10	6	2	3	23
South Africa	3	-	1	neg	13
Sweden	15	9	11	64	12
Ireland	8	13	2	7	11
Switzerland	8	8	9	15	9
Belgium	9	16	7	5	7
Denmark	7	14	24	7	5
Norway	6	5	-	1	3
Iceland	-	-	-	neg	3
Australia	5	neg	3	-	1
New Zealand	<u>1</u>	<u>neg</u>	<u>1</u>	<u>5</u>	<u>1</u>
Total Developed	3,512	4,420	4,157	3,671	3,828
<u>OTHER</u>					
Portugal	445	301	61	71	224
Greece	27	22	32	65	71
Israel	130	204	135	36	12
Spain	34	22	3	10	8
Yugoslavia	<u>17</u>	<u>3</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Other	653	552	231	182	315
 TOTAL ALL SOURCES	 56,683	 77,247	 52,892	 57,531	 54,262

Totals may not add due to rounding.

BLOUSES & SHIRTS -
WOMEN'S & GIRLS'

APPARENT CANADIAN MARKET

CONTROL NO. 39.1

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	25,756	15,759	15,981	15,630	16,510
Less Exports ⁽¹⁾	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>
Net Domestic Shipments	25,756	15,759	15,981	15,630	16,510
Imports ⁽⁸⁾	<u>24,500</u>	<u>27,867</u>	<u>19,189</u>	<u>22,270</u>	<u>25,336</u>
Apparent Canadian Market	50,256	43,626	35,170	37,900	41,846
Share of Market held by	--- percent ---				
Net Domestic Shipments	51	36	45	41	39
Imports	49	64	55	59	61

BLOUSES & SHIRTS - WOMEN'S & GIRLS'

IMPORTS

CONTROL NO. 39.1

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
Taiwan	8,208	10,656	5,249	7,811	8,030
Hong Kong	5,838	6,381	5,789	5,959	6,480
Korea, R. of	3,510	3,877	4,459	4,478	3,726
India	1,629	3,050	1,235	1,226	1,943
Malaysia	913	853	402	344	674
China, P. R. of	426	396	106	112	454
Singapore	138	64	53	33	317(3)
Philippines	106	141	61	41	195
Thailand	62	92	5	49	78
Macao	-	-	21	36	48
Bulgaria	<u>-</u>	<u>-</u>	<u>-</u>	<u>neg</u>	<u>-</u>
Total Restrained	20,830	25,510	17,380	20,089	21,945

BLOUSES & SHIRTS - WOMEN'S & GIRLS'

IMPORTS (Continued)

CONTROL NO. 39.1

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>UNRESTRAINED LOW-COST</u>	--- '000 garments ---				
Poland	145	211	140	342	778
Romania	-	18	18	39	300
Hungary	8	-	13	53	121
El Salvador	27	-	1	27	44
Sri Lanka	-	-	35	3	40
Pakistan	167	130	20	25	40
Honduras	-	-	-	-	26
Mexico	11	5	4	6	6
Afghanistan	7	-	10	7	6
Jamaica	5	-	-	neg	2
Morocco	30	32	28	6	1
Turkey	11	53	-	-	1
Korea, North	-	-	11	-	1
Indonesia	2	-	neg	neg	1
Ecuador	1	1	1	neg	neg
Cyprus	2	-	2	1	neg
Malta	1	-	neg	neg	neg
Brazil	168	182	5	-	neg
Guatemala	3	2	neg	1	neg
Peru	-	-	-	-	neg
Colombia	112	191	11	1	-
Barbados	-	-	1	-	-
Guyana	-	-	neg	-	-
U.S.S.R.	2	-	-	-	-
Iran	neg	-	-	-	-
Argentina	neg	-	-	-	-
Uruguay	neg	-	-	-	-
Trinidad	3	-	-	-	-
Other	2	-	-	1	1
Total Unrestrained Low-Cost	707	825	300	512	1,368

BLOUSES & SHIRTS - WOMEN'S & GIRLS'

IMPORTS (Continued)

CONTROL NO. 39.1

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.	394	526	384	531	777
Japan	252	334	506	285	371
Italy	194	179	158	214	322
France	230	213	270	384	309
United Kingdom	111	96	90	77	86
Germany, West	20	18	50	51	37
South Africa	3	-	1	neg	13
Sweden	10	8	4	55	11
Ireland	5	3	2	7	11
Finland	6	3	2	5	9
Switzerland	7	7	9	10	9
Netherlands	2	1	neg	1	8
Denmark	5	10	5	4	4
Austria	20	4	3	2	3
Belgium	2	5	2	-	2
New Zealand	-	-	neg	-	1
Norway	-	-	-	neg	1
Australia	-	-	2	-	1
Iceland	-	-	-	neg	neg
Total Developed	1,261	1,407	1,488	1,628	1,975
<u>OTHER</u>					
Greece	15	13	3	3	41
Israel	61	97	17	15	5
Portugal	20	12	neg	17	1
Spain	3	3	1	3	1
Yugoslavia	2	2	-	-	-
Total Other	101	127	21	38	48
 TOTAL ALL SOURCES	 22,898	 27,867	 19,189	 22,270	 25,336

Totals may not add due to rounding.

T-SHIRTS, (EXCL. UNDERWEAR T-SHIRTS)
WOMEN'S, GIRLS', MEN'S, BOYS'

APPARENT CANADIAN MARKET

CONTROL NO. 39.2

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	10,719	12,321	15,127	17,512	19,250
Less Exports ⁽¹⁾	<u>83</u>	<u>89</u>	<u>109</u>	<u>99</u>	<u>122</u>
Net Domestic Shipments	10,636	12,232	15,018	17,413	19,128
Imports ⁽⁸⁾	<u>24,800</u>	<u>36,573</u>	<u>25,067</u>	<u>24,302</u>	<u>20,198</u>
Apparent Canadian Market	35,436	48,805	40,085	41,715	39,326

Share of Market held by	--- percent ---				
Net Domestic Shipments	30	25	37	42	49
Imports	70	75	63	58	51

T-SHIRTS, (EXCL. UNDERWEAR T-SHIRTS)
WOMEN'S, GIRLS', MEN'S, BOYS'

IMPORTS

CONTROL NO. 39.2

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
Taiwan	8,311	12,504	6,097	6,316	6,943
Hong Kong	2,251	5,157	5,194	6,901	3,828
China, P.R. of	2,741	5,538	4,121	3,535	3,710
Korea, R. of	3,419	4,507	4,409	3,720	2,541
India	708	1,194	537	135	294
Philippines	80	175	69	91	265
Poland	346	730	923	985	192
Singapore	380	176	6	45	171
Thailand	-	-	-	-	84
Macao	12	18	29	43	44
Romania	<u>399</u>	<u>367</u>	<u>29</u>	<u>48</u>	<u>20</u>
Total Restrained	18,647	30,366	21,414	21,819	18,092

UNRESTRAINED LOW-COST

Pakistan	3,944	3,098	1,630	904	752
Indonesia	3	1	-	-	161
Hungary	-	-	9	46	82
Morocco	126	115	64	11	46
Turkey	2	7	22	-	12
Malta	-	-	-	-	11
El Salvador	-	-	-	-	4
Brazil	1,300	1,013	158	101	neg
Malaysia	-	7	5	-	neg
Mexico	120	49	neg	1	-
Colombia	15	27	-	-	-
Korea, North	6	14	-	-	-
Barbados	-	12	-	-	-
Mauritius	10	1	-	-	-
Afghanistan	<u>1</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Unrestrained Low-Cost	5,527	4,344	1,888	1,063	1,068

(Continued)

T-SHIRTS (EXCL. UNDERWEAR T-SHIRTS
WOMEN'S, GIRLS', MEN'S, BOYS'

IMPORTS (Continued)

CONTROL NO. 39.2

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.	514	687	440	649	325
Italy	188	174	338	254	220
France	95	88	93	143	130
Japan	368	488	664	196	91
Netherlands	3	2	-	1	11
United Kingdom	36	31	29	25	9
Germany, West	8	7	16	2	7
Belgium	6	10	5	3	4
Iceland	-	-	-	-	3
Norway	6	5	-	-	2
Austria	14	-	4	9	1
Finland	neg	neg	1	2	1
Denmark	2	3	18	3	1
Sweden	1	1	1	2	neg
Switzerland	neg	neg	neg	4	-
Ireland	3	10	-	neg	-
Australia	-	-	1	-	-
Total Developed	1,244	1,506	1,610	1,293	805
<u>OTHER</u>					
Portugal	300	243	17	43	205
Greece	12	9	29	61	27
Israel	60	88	109	18	1
Spain	29	19	1	6	-
Yugoslavia	15	1	-	-	-
Total Other	416	360	156	128	233
TOTAL ALL SOURCES	25,834	36,573	25,067	24,302	20,198

Totals may not add due to rounding.

SWEATSHIRTS - WOMEN'S,
GIRLS', MEN'S, BOYS'

APPARENT CANADIAN MARKET

CONTROL NO. 39.3

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	1,902	1,471	1,592	1,593	1,896
Less Exports ⁽¹⁾	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>
Net Domestic Shipments	1,902	1,471	1,592	1,593	1,896
Imports ⁽⁸⁾	<u>3,951</u>	<u>7,061</u>	<u>3,036</u>	<u>3,427</u>	<u>3,293</u>
Apparent Canadian Market	5,853	8,532	4,628	5,020	5,189

Share of Market held by	--- percent ---				
Net Domestic Shipments	33	17	34	32	37
Imports	68	83	66	68	63

SWEATSHIRTS, - WOMEN'S,
GIRLS', MEN'S, BOYS',

IMPORTS

CONTROL NO. 39.3

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
Taiwan	1,746	2,710	1,418	1,361	1,200
Romania	75	317	86	114	452
Poland	40	361	429	939	436
China, P. R. of	374	573	39	132	378
Korea, R. of	559	1,057	443	446	306
Hong Kong	643	997	360	164	70
Singapore	-	6	neg	-	63
Philippines	1	2	5	2	3
Thailand	-	-	-	-	3
India	-	66	neg	neg	2
Macao	-	-	-	-	-
Total Restrained	3,438	6,089	2,780	3,158	2,913
<u>UNRESTRAINED LOW-COST</u>					
Hungary	-	-	12	37	6
Pakistan	54	184	9	9	2
Mexico	neg	2	neg	-	1
Malaysia	-	137	-	-	-
Morocco	20	-	-	7	-
Brazil	20	21	-	-	-
Turkey	-	1	-	-	-
Afganistan	-	1	-	-	-
Guatemala	-	neg	-	-	-
Ecuador	-	neg	-	-	-
Total Unrestrained Low-Cost	94	346	21	53	9

SWEATSHIRTS - WOMEN'S,
GIRLS', MEN'S, BOYS'

IMPORTS (Continued)

CONTROL NO. 39,3

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.	214	438	77	134	290
Italy	22	37	22	30	33
France	24	42	5	12	32
United Kingdom	6	34	8	5	5
Japan	-	11	74	-	2
New Zealand	1	neg	1	5	neg
Finland	5	1	-	-	neg
Germany, West	1	3	1	10	neg
Netherlands	2	1	1	-	neg
Ireland	neg	neg	-	-	neg
Belgium	neg	neg	-	-	neg
Sweden	1	neg	neg	7	-
Switzerland	1	1	neg	1	-
Denmark	neg	1	1	-	-
Norway	-	-	-	neg	-
Australia	5	neg	-	-	-
South Africa	-	-	neg	-	-
Total Developed	282	569	190	204	362
<u>OTHER</u>					
Portugal	125	46	43	11	4
Israel	3	10	neg	-	3
Greece	-	-	-	-	3
Spain	2	1	1	-	neg
Total Other	130	57	44	11	10
 TOTAL ALL SOURCES	 3,945	 7,061	 3,036	 3,427	 3,293

Totals may not add due to rounding.

BLOUSES, SHIRTS, T-SHIRTS,
SWEATSHIRTS - CHILDREN'S
AND INFANTS' (7-6x)

APPARENT CANADIAN MARKET

CONTROL NO. 39.4

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	7,947	8,674	7,719	7,404	7,509
Less Exports ⁽¹⁾	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>
Net Domestic Shipments	7,947	8,674	7,719	7,404	7,509
Imports ⁽⁸⁾	<u>3,968</u>	<u>5,747</u>	<u>5,600</u>	<u>7,532</u>	<u>5,435</u>
Apparent Canadian Market	11,915	14,421	13,319	14,936	12,944

Share of Market held by	--- percent ---				
Net Domestic Shipments	67	60	58	50	58
Imports	33	40	42	50	42

BLOUSES, SHIRTS, T-SHIRTS,
SWEATSHIRTS - CHILDREN'S
AND INFANTS' (0-6x)

IMPORTS

CONTROL NO. 39.4

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
Taiwan	1,495	2,761	2,301	3,411	2,189
Korea, R. of	293	401	1,066	1,966	765
Hong Kong	475	605	519	663	659
China, P.R. of	31	76	453	508	600
India	24	132	13	34	67
Singapore	-	-	neg	4	46
Romania	18	39	5	-	36
Poland	15	30	15	17	30
Macao	-	-	-	20	19
Philippines	38	38	84	10	12
Malaysia	-	-	-	53	-
Thailand	-	2	1	-	-
Bulgaria	-	-	-	-	-
Total Restrained	2,389	4,084	4,457	6,686	4,423
<u>UNRESTRAINED LOW-COST</u>					
Indonesia	-	-	-	-	103
Pakistan	765	601	128	117	96
Brazil	120	105	92	-	56
Haiti	-	-	-	-	39
Morocco	-	-	-	-	6
Sri Lanka	-	-	-	-	3
Mexico	-	-	neg	1	2
Turkey	-	-	-	-	1
Guatemala	-	-	neg	-	neg
Afganistan	-	-	-	neg	neg
Hungary	-	-	neg	-	neg
El Salvador	-	-	-	-	neg
Barbados	-	7	38	177	-
Ecuador	-	-	-	-	neg
Colombia	-	-	6	-	-
Total Unrestrained Low-Cost	885	713	264	295	306

(Continued)

BLOUSES, SHIRTS, T-SHIRTS,
SWEATSHIRTS - CHILDREN'S
AND INFANTS' (0-6X)

IMPORTS (Continued)

CONTROL NO. 39.4

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.	660	883	665	465	493
France	8	8	23	42	70
Italy	12	11	29	25	40
Finland	-	-	-	neg	32
Austria	5	-	5	-	31
Germany, West	neg	neg	neg	1	8
United Kingdom	24	21	7	5	4
Netherlands	4	3	neg	1	3
Denmark	neg	neg	1	-	neg
Belgium	neg	neg	-	-	neg
Japan	10	13	132	7	neg
Switzerland	neg	neg	neg	1	neg
Sweden	3	1	6	1	-
Ireland	-	-	-	neg	-
Total Developed	726	940	868	548	681
<u>OTHER</u>					
Portugal	-	-	-	neg	15
Spain	-	-	-	1	7
Israel	6	9	9	3	2
Greece	neg	neg	neg	1	neg
Total Other	6	9	9	5	24
 TOTAL ALL SOURCES	 4,007	 5,747	 5,600	 7,532	 5,435

Totals may not add due to rounding

DEFINITION

- 40.1 PYJAMAS AND SLEEPWEAR (Men's, Boys', Women's, Girls')
A garment normally worn for sleeping.
- 40.2 BATHROBES, DRESSING GOWNS (Women's, Girls', Men's, Boys')
Garments other than sleepwear normally worn in privacy,
including bed jackets, and negligées.
- 40.3 PYJAMAS AND SLEEPWEAR, BATHROBES AND DRESSING GOWNS
(Children's and Infants 0-6x)
As above including garments described as sleepers and
blanket sleepers where the legs extend to completely en-
case the feet.

SECTOR PROFILE

- Based on the latest statistics available (1976) the Canadian industry producing apparel defined in Control No. 40 consists of 102 establishments.
- Based on establishments reporting production of this range of apparel to Statistics Canada, in 1976 the regional distribution was:

80	Québec:	78%
17	Ontario:	17%
5	Other:	5%

- the major centres of production are Montréal and Toronto.
- In 1979 in unit terms the production in this apparel grouping was:

- Pyjamas and sleepwear other than 0-6x	47%
- Bathrobes and dressing gowns other than 0-6x	22%
- All items (0-6x)	31%

- Fifteen establishments producing these types of apparel in the years 1975 to 1978 employed on the average 1,250 production workers.
- The average annual increases in domestic shipments from 1975 to 1979 for Control Nos. 40.1 to 40.3 are as follows:

<u>Control No.</u>	<u>Average annual increases 1975 to 1979</u>
40.1	+ 3.6%
40.2	+ 2.7%
40.3	+12.2%

PYJAMAS & SLEEPWEAR
BATHROBES, DRESSING GOWNS

APPARENT CANADIAN MARKET

CONTROL NO. 40

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	26,932	28,904	24,991	28,440	32,611
Less Exports ⁽¹⁾	<u>208</u>	<u>275</u>	<u>217</u>	<u>246</u>	<u>276</u>
Net Domestic Shipments	26,724	28,629	24,774	28,194	32,335
Imports ⁽⁸⁾	<u>5,265</u>	<u>8,494</u>	<u>6,338</u>	<u>4,518</u>	<u>6,158</u>
Apparent Canadian Market	31,989	37,123	31,112	32,712	38,493

Share of Market held by	--- percent ---				
Net Domestic Shipments	84	77	80	86	84
Imports	16	23	20	14	16

PYJAMAS & SLEEPWEAR
BATHROBES, DRESSING GOWNS

IMPORTS

CONTROL NO. 40

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	<u>Restraint levels 1981</u>
<u>RESTRAINED</u>			--- '000 garments ---			
China, P. R. of	1,046	3,929	2,077	1,183	2,472	1,935(5)
Taiwan	2,558	2,269	2,785	2,295	2,060	2,865
Poland	197	370	172	193	201	231
Hong Kong	396	353	235	88	130	328(17)
Korea, R. of	<u>43</u>	<u>130</u>	<u>131</u>	<u>61</u>	<u>88</u>	<u>126(17)</u>
Total Restrained	4,240	7,051	5,400	3,820	4,951	5,485(4+20)
<u>UNRESTRAINED LOW-COST</u>						
Brazil	n/a	395	252	245	345	
Romania	83	92	12	neg	322	
Pakistan	8	3	1	2	67	
Philippines	81	99	86	10	26	
India	4	3	3	4	21	
Thailand	4	6	13	-	10	
El Salvador	n/a	38	3	3	5	
Singapore	-	1	31	-	1	
Colombia	-	-	-	-	1	
Bolivia	-	-	-	-	neg	
Mexico	-	-	neg	-	neg	
Puerto Rico	-	-	-	-	neg	
Hungary	42	10	8	1	-	
Turkey	-	1	-	-	-	
Afghanistan	-	-	neg	-	-	
Venezuela	-	-	-	1	-	
Haiti	<u>-</u>	<u>2</u>	<u>-</u>	<u>-</u>	<u>-</u>	
Total Unrestrained Low-Cost	222	650	409	266	798	

PYJAMAS & SLEEPWEAR,
BATHROBES, DRESSING GOWNS

IMPORTS (Continued)

CONTROL NO. 40

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.	281	515	342	225	183
France	77	60	43	80	77
United Kingdom	120	127	73	60	60
Italy	17	33	33	35	52
Japan	8	42	18	21	10
Finland	n/a	neg	neg	neg	4
Germany, West	7	2	10	neg	3
Sweden	-	-	neg	neg	2
Ireland	n/a	neg	neg	neg	1
Austria	n/a	3	1	neg	1
Switzerland	n/a	2	1	5	1
Belgium	n/a	1	neg	1	neg
Denmark	n/a	neg	-	1	neg
Netherlands	-	-	1	neg	neg
Iceland	-	-	-	neg	-
Total Developed	510	785	522	428	394
<u>OTHER</u>					
Spain	n/a	6	7	4	8
Portugal	-	1	-	neg	5
Israel	n/a	2	2	neg	neg
Total Other	n/a	9	9	4	13
 TOTAL ALL SOURCES	 5,265	 8,494	 6,338	 4,518	 6,158

Totals may not add due to rounding.

PYJAMAS & SLEEPWEAR - WOMEN'S
GIRLS', MEN'S, BOYS'

APPARENT CANADIAN MARKET

CONTROL NO. 40.1

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	13,638	15,083	12,676	14,203	15,265
Less Exports ⁽¹⁾	<u>71</u>	<u>100</u>	<u>55</u>	<u>76</u>	<u>55</u>
Net Domestic Shipments	13,567	14,983	12,621	14,127	15,210
Imports ⁽⁸⁾	<u>3,679</u>	<u>6,040</u>	<u>4,213</u>	<u>3,041</u>	<u>4,142</u>
Apparent Canadian Market	17,246	21,023	16,834	17,168	19,352

Share of Market held by	--- percent ---				
Net Domestic Shipments	79	71	75	82	79
Imports	21	29	25	18	21

PYJAMAS & SLEEPWEAR - WOMEN'S
GIRLS', MEN'S, BOYS'

IMPORTS

CONTROL NO. 40.1

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
China, P. R. of	641	3,221	1,500	694	1,711
Taiwan	2,241	1,999	2,212	1,886	1,666
Hong Kong	240	201	102	30	43
Korea, R. of	33	43	90	24	35
Poland	<u>38</u>	<u>94</u>	<u>38</u>	<u>121</u>	<u>22</u>
Total Restrained	3,193	5,558	3,942	2,755	3,477

UNRESTRAINED LOW-COST

Romania	79	39	4	neg	322
Pakistan	3	1	neg	2	67
India	1	1	2	3	17
Philippines	75	9	17	10	10
Thailand	-	-	2	-	6
Brazil	n/a	n/a	n/a	18	2
Singapore	-	neg	9	-	1
Colombia	n/a	n/a	n/a	-	1
Puerto Rico	n/a	n/a	n/a	-	neg
Hungary	15	-	neg	1	-
Venezuela	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>neg</u>	<u>-</u>
Total Unrestrained Low-Cost	173	50	34	34	426

PYJAMAS & SLEEPWEAR - WOMEN'S
GIRLS, MEN'S, BOYS

IMPORTS (Continued)

CONTROL NO. 40.1

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.	77	189	105	113	117
United Kingdom	106	107	55	49	47
France	50	37	29	56	31
Italy	6	29	25	24	28
Sweden	n/a	n/a	n/a	-	2
Germany, West	1	1	neg	neg	1
Finland	n/a	n/a	n/a	neg	1
Switzerland	n/a	n/a	n/a	4	1
Denmark	n/a	n/a	n/a	neg	neg
Japan	-	3	6	2	neg
Belgium	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>1</u>	<u>-</u>
Total Developed	240	366	220	249	228
<u>OTHER</u>					
Spain	n/a	n/a	n/a	4	7
Portugal	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>-</u>	<u>1</u>
Total Other				4	8
 TOTAL ALL SOURCES	 3,679	 6,040	 4,213	 3,041	 4,142

BATHROBES, DRESSING GOWNS -
WOMEN'S, GIRLS', MEN'S, BOYS'

APPARENT CANADIAN MARKET

CONTROL NO. 40.2

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	6,382	6,322	5,851	6,423	7,072
Less Exports ⁽¹⁾	<u>117</u>	<u>151</u>	<u>143</u>	<u>143</u>	<u>193</u>
Net Domestic Shipments	6,265	6,171	5,708	6,280	6,879
Imports ⁽⁸⁾	<u>671</u>	<u>980</u>	<u>880</u>	<u>635</u>	<u>979</u>
Apparent Canadian Market	6,936	7,151	6,588	6,915	7,858

Share of Market held by	--- percent ---				
Net Domestic Shipments	90	86	87	91	88
Imports	10	14	13	9	12

BATHROBES, DRESSING GOWNS -
WOMEN'S, GIRLS', MEN'S, BOYS'

IMPORTS

CONTROL NO. 40.2

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
China, P. R. of	348	451	357	215	406
Taiwan	51	64	165	173	193
Poland	69	80	76	72	169
Hong Kong	44	46	64	18	53
Korea, R. of	<u>6</u>	<u>11</u>	<u>38</u>	<u>31</u>	<u>42</u>
Total Restrained	518	652	700	509	863
<u>UNRESTRAINED LOW-COST</u>					
Philippines	1	1	neg	neg	16
Brazil	n/a	n/a	n/a	13	6
Thailand	4	6	6	-	5
El Salvador	n/a	n/a	n/a	neg	2
India	1	2	1	1	1
Colombia	n/a	n/a	n/a	-	neg
Mexico	n/a	n/a	n/a	-	neg
Bolivia	n/a	n/a	n/a	-	neg
Hungary	6	10	8	-	-
Venezuela	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>neg</u>	<u>-</u>
Total Unrestrained Low-Cost	12	19	15	14	30

BATHROBES, DRESSING GOWNS -
WOMEN'S, GIRLS', MEN'S, BOYS'

IMPORTS (Continued)

CONTROL NO. 40.2

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.	80	104	95	68	31
Italy	3	2	6	10	18
France	5	7	6	7	14
United Kingdom	11	15	15	8	10
Japan	8	37	9	17	10
Germany, West	6	1	8	neg	1
Ireland	n/a	n/a	n/a	neg	1
Austria	n/a	n/a	n/a	neg	1
Switzerland	n/a	n/a	n/a	1	neg
Finland	n/a	n/a	n/a	neg	neg
Netherlands	n/a	n/a	n/a	neg	neg
Denmark	n/a	n/a	n/a	neg	neg
Belgium	n/a	n/a	n/a	neg	neg
Sweden	n/a	n/a	n/a	-	neg
Iceland	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>neg</u>	<u>-</u>
Total Developed	113	166	139	111	86
<u>OTHER</u>					
Spain	n/a	n/a	n/a	-	neg
Israel	n/a	n/a	n/a	neg	neg
TOTAL ALL SOURCES	671	980	880	635	979

Totals may not add due to rounding.

PYJAMAS, SLEEPWEAR, BATHROBES, DRESSING
GOWNS - CHILDREN'S & INFANTS' (0-6x)

APPARENT CANADIAN MARKET

CONTROL 40.3

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	6,912	7,499	6,464	7,814	10,274
Less Exports ⁽¹⁾	<u>20</u>	<u>24</u>	<u>19</u>	<u>27</u>	<u>28</u>
Net Domestic Shipments	6,892	7,475	6,445	7,787	10,246
Imports ⁽⁸⁾	<u>915</u>	<u>1,474</u>	<u>1,245</u>	<u>842</u>	<u>1,038</u>
Apparent Canadian Market	7,807	8,949	7,690	8,629	11,284

Share of Market held by

--- percent --

Net Domestic Shipments	88	84	84	90	91
Imports	12	16	16	10	9

PYJAMAS, SLEEPWEAR, BATHROBES, DRESSING
GOWNS - CHILDREN'S & INFANTS (0-6x)

IMPORTS

CONTROL NO. 40.3

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
China, P.R. of	58	258	220	274	355
Taiwan	266	206	408	237	201
Hong Kong	112	106	70	40	34
Korea, R. of	4	76	3	6	11
Poland	<u>90</u>	<u>196</u>	<u>58</u>	<u>-</u>	<u>11</u>
Total Restrained	530	842	759	557	612
<u>UNRESTRAINED LOW-COST</u>					
Brazil	n/a	n/a	n/a	215	337
India	2	neg	1	neg	3
El Salvador	n/a	n/a	n/a	3	3
Philippines	6	16	68	-	1
Singapore	-	1	22	-	neg
Romania	4	53	8	-	-
Thailand	-	-	5	-	-
Pakistan	6	2	neg	-	-
Hungary	<u>21</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Unrestrained Low-Cost	39	72	104	218	344

PYJAMAS, SLEEPWEAR, BATHROBES, DRESSING
GOWNS - CHILDREN'S & INFANTS' (0-6x)

IMPORTS (Continued)

CONTROL NO. 40.3

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>			---	'000 garments	---
U.S.A.	123	222	142	43	35
France	22	16	9	16	32
Italy	8	2	2	1	5
United Kingdom	3	4	3	4	3
Finland	n/a	n/a	n/a	neg	2
Germany, West	-	1	1	neg	neg
Ireland	n/a	n/a	n/a	-	neg
Sweden	n/a	n/a	n/a	neg	neg
Austria	n/a	n/a	n/a	-	neg
Japan	-	3	3	2	neg
Switzerland	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>-</u>	<u>neg</u>
Total Developed	156	248	160	66	77
<u>OTHER</u>					
Portugal	n/a	n/a	n/a	neg	3
Spain	<u>n/a</u>	<u>n/a</u>	<u>n/a</u>	<u>neg</u>	<u>neg</u>
Total Other				neg	3
TOTAL ALL SOURCES	915	1,474	1,245	842	1,038

Totals may not add due to rounding.

DEFINITION

A raincoat is considered to be a garment normally worn to protect against the rain. It is normally manufactured from fabric, and includes suits, capes and ponchos. Vinyl, rubber and plastic raincoats are included as well.

SECTOR PROFILE

- Based on the latest statistics available (1976), the Canadian raincoat industry is comprised of 48 firms.
- Regionally speaking, the industry is primarily located in Québec (58 percent), and Ontario and Manitoba (17 percent) each.
- Major centres of production, in order of importance, are Montréal, Winnipeg and Toronto.
- There is no published data available on total employment in this sector. From a survey of 21 firms in 1978, representing 41.3 percent of domestic shipments, production employees were reported as being 857.
- Due to confidentiality, Statistics Canada does not publish separate data on shipments of vinyl, rubber and plastic raincoats.
- In addition to raincoats, firms in the industry sector also produce overcoats, topcoats and jackets.

RAINCOATS

APPARENT CANADIAN MARKET

CONTROL NO. 41

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	1,496	1,314	1,108	1,475	1,600
Less Exports ⁽¹⁾	<u>6</u>	<u>8</u>	<u>15</u>	<u>14</u>	<u>10</u>
Net Domestic Shipments	1,490	1,306	1,093	1,461	1,590
Imports - Vinyl/Rubber	760	1,116	931	948	1,094
- Textile	<u>405</u>	<u>683</u>	<u>1,054</u>	<u>698</u>	<u>729</u>
Apparent Canadian Market	2,655	3,105	3,078	3,107	3,413

Share of Market held by	--- percent ---				
Net Domestic Shipments	56	42	36	47	47
Imports	44	58	64	53	53

RAINCOATS

IMPORTS

CONTROL NO. 41

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	Restraint levels <u>1981</u>
<u>RESTRAINED</u>	--- '000 garments ---					
Taiwan	601	982	1,008	876	570	675
Korea, R. of	64	145	397	348	89	149
Hong Kong	25	132	108	60	76	86
Bulgaria	-	-	-	-	n/a	112
Total Restrained	690	1,259	1,513	1,284	735	1,022 (4)
<u>UNRESTRAINED LOW-COST</u>						
China, P.R. of	-	-	neg	-	353	
Korea, R. of	75	85	87	84	329	
Hong Kong	170	215	170	80	204	
Romania	neg	-	22	25	25	
Poland	41	61	32	19	24	
Singapore	-	-	1	-	-	
Malaysia	-	-	1	-	-	
Costa Rica	7	-	-	-	-	
Hungary	-	-	-	neg	-	
Philippines	-	-	-	neg	-	
Total Unrestrained Low-Cost	293	361	313	208	935	

RAINCOATS

IMPORTS (Continued)

CONTROL NO. 41

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
Japan	105	109	75	84	57
U.S.A.	33	16	21	28	50
France	7	13	15	10	25
Italy	4	4	2	5	6
United Kingdom	14	22	13	11	5
Norway	9	5	15	6	3
Finland	2	2	2	1	2
Sweden	-	-	2	neg	2
Germany, West	neg	1	5	3	1
New Zealand	-	-	-	-	1
Belgium	1	1	neg	1	neg
Switzerland	1	1	2	1	neg
Netherlands	2	3	3	neg	neg
Denmark	1	neg	neg	neg	-
Austria	-	-	neg	neg	-
Ireland	-	-	neg	-	-
Iceland	neg	-	-	-	-
South Africa	<u>neg</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Developed	179	177	155	150	152
<u>OTHER</u>					
Israel	2	1	2	neg	neg
Spain	neg	neg	neg	1	-
Yugoslavia	<u>-</u>	<u>-</u>	<u>1</u>	<u>-</u>	<u>-</u>
Total Other	2	1	3	1	neg
TOTAL ALL SOURCES	1,166	1,799	1,985	1,645	1,823

Totals may not add due to rounding.

RAINCOATS - VINYL
OR RUBBER

IMPORTS

CONTROL NO. 41.1

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
Taiwan	449	728	628	714	415
<u>UNRESTRAINED LOW-COST</u>					
Korea, R. of	75	85	87	84	329
Hong Kong	170	215	170	80	204
China, P.R. of	-	-	-	-	70
Total Unrestrained Low-Cost	245	300	257	164	603
<u>DEVELOPED</u>					
Japan	24	55	16	45	42
U.S.A.	28	12	14	21	32
France	1	7	8	1	1
New Zealand	-	-	-	-	1
United Kingdom	10	11	4	2	neg
Italy	2	3	neg	neg	neg
Norway	-	-	2	-	-
Netherlands	-	-	neg	-	-
Belgium	-	neg	neg	-	-
Switzerland	-	-	neg	-	-
Denmark	-	neg	neg	-	-
Iceland	neg	-	-	-	-
Total Developed	65	88	44	69	76
<u>OTHER</u>	-	-	-	-	-
TOTAL ALL SOURCES	760	1,116	931	948	1,094

Totals may not add due to rounding.

RAINCOATS - TEXTILE

IMPORTS

CONTROL NO. 41.2

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
Taiwan	152	254	380	162	155
Korea, R. of	64	145	397	348	89
Hong Kong	25	132	108	60	76
Bulgaria	-	-	-	-	n/a
Total Restrained	241	531	885	570	320
<u>UNRESTRAINED LOW-COST</u>					
China, P.R. of	-	-	neg	-	283
Romania	neg	-	22	25	25
Poland	41	61	32	19	24
Singapore	-	-	1	-	-
Malaysia	-	-	1	-	-
Costa Rica	7	-	-	-	-
Hungary	-	-	-	neg	n/a
Philippines	-	-	-	neg	-
Total Unrestrained					
Low-Cost	48	61	56	44	332

RAINCOATS - TEXTILE

IMPORTS (Continued)

CONTROL NO. 41.2

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>					
	--- '000 garments ---				
France	6	6	7	9	24
U.S.A.	5	4	7	8	18
Japan	80	54	58	39	16
Italy	2	2	2	5	5
United Kingdom	3	11	10	9	4
Norway	9	5	13	6	3
Finland	2	2	2	1	2
Sweden	-	-	2	neg	2
Germany, West	neg	1	5	3	1
Belgium	1	1	neg	1	neg
Switzerland	1	1	2	1	neg
Netherlands	2	3	3	neg	neg
Denmark	1	neg	neg	neg	-
Austria	-	-	neg	neg	-
South Africa	neg	-	-	-	-
Ireland	-	-	neg	-	-
Total Developed	112	90	111	82	75
<u>OTHER</u>					
Israel	2	1	2	neg	neg
Spain	neg	neg	neg	1	-
Yugoslavia	-	-	1	-	-
Total Other	2	1	3	1	neg
TOTAL ALL SOURCES	405	683	1,054	698	729

Totals may not add due to rounding.

DEFINITION

42.1 DRESSES (Women's, Girls')

A one-piece garment extending above the waist, including jumpers, evening gowns, dusters, housecoats and caftans (other than sleepwear).

42.2 SKIRTS (Women's, Girls')

One-piece garment not extending above the waist, including golf skirts and kilts.

42.3 SUITS, COORDINATES (Women's, Girls') AND OUTERWEAR SETS
(Women's, Girls', Men's, Boys')

A garment comprising of two or more matched or coordinated pieces covering both the upper and lower parts of the body, packed and shipped as a set.

Note: Outerwear sets include: coat and dress sets, blouse and pant or skirt sets, shirt and pant or skirt sets, cabana sets, beach pyjamas, lounging pyjamas, short sets, and beachwear (other than described in Control Item No. 44).

It excludes:

- (1) garments described in Control Item Nos. 32, 38, 40, 41, 44 and 47;
- (2) athletic clothing (see below);
- (3) dresses or skirts with coordinated or matched accessories, e.g. scarves, hats, etc., which by themselves are not subject to Control Items Nos. 32 or 37-50.

42.4 ATHLETIC SETS OR SUITS (Women's, Girls', Men's, Boys')

A garment normally consisting of two or more matched or coordinated pieces covering both the lower and upper parts of the body, packed and shipped as a set, normally worn for participation in athletic activities and not covered by any other definition. It includes leotards covering the trunk of the body, judo sets, track suits, jogging suits, cross-country ski suits (subject to the description in Control Item No. 32).

42.5 DRESSES, SKIRTS, SUITS, CO-ORDINATES, SHORT SETS, ETC.

(Children's and Infants' 0-6x)

Children's and infants' garment (0-6x) including sunsuits, christening sets, pram sets, creepers, rompers, crawlers and diaper sets and any other such garments as described not provided for in other control numbers.

SECTOR PROFILE

- Based on the latest statistics available (1976) the Canadian industry producing apparel defined in Control No. 42 consists of 330 establishments.
- Based on establishments reporting production of this range of apparel to Statistics Canada, in 1975 and 1976 the regional distribution was:

246	Québec:	75%
57	Ontario:	17%
27	Other:	8%

- By far the majority of producers are located in Montréal.
- In 1979 in unit terms the production in this apparel grouping was:

- dresses other than 0-6x	35%
- skirts other than 0-6x	18%
- suits and coordinates other than (0-6x)	16%
- athletic suits or sets other than (0-6x)	13%
- above apparel (0-6x)	18%

- A survey of 53 establishments reporting production of these types of apparel in the years 1975 to 1978 inclusive revealed an average number of 4,311 production employees in the sector.
- a survey for 1978 which included the following establishment producing each of the five categories of apparel within this grouping showed their production as a percentage of total output in their respective sector as follows:

<u>Sector</u>	<u>Number of establishments</u>	<u>Percent of Production</u>
42.1	46	40
42.2	29	32
42.3	34	60
42.4	10	20
42.5	26	60

- The 13 percent decrease in domestic shipments of dresses (Control No. 42.1) in 1979 over 1978 is consistent with the increase in shipments of skirts (Control No. 42.2), suits and coordinates (Control No. 42.3) and blouses (Control No. 39.1). The decrease in domestic shipments of dresses in 1979 followed an extremely high shipment year in 1978, indicating a possible overstocking of dresses in 1979.

DRESSES, SKIRTS, SUITS & CO-ORDINATES
ATHLETIC SUITS OR SETS, SHORT SETS

APPARENT CANADIAN MARKET

CONTROL NO. 42

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	35,550	32,489	31,573	37,187	35,511
Less Exports ⁽¹⁾	<u>420</u>	<u>404</u>	<u>371</u>	<u>369</u>	<u>390</u>
Net Domestic Shipments	35,130	32,085	31,202	36,818	35,121
Imports ⁽⁸⁾	<u>14,459</u>	<u>23,391</u>	<u>15,697</u>	<u>12,629</u>	<u>14,641</u>
Apparent Canadian Market	49,589	55,476	46,899	49,447	49,762

Share of Market held by	--- percent ---				
Net Domestic Shipments	71	58	67	74	71
Imports	29	42	33	26	29

DRESSES, SKIRTS, SUITS & CO-ORDINATES
ATHLETIC SUITS OR SETS, SHORT SETS

IMPORTS

CONTROL NO. 42

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	Restraint levels <u>1981</u>
<u>RESTRAINED</u>			--- '000 garments ---			
Taiwan	5,029	7,792	4,896	3,450	2,935	4,964
Hong Kong	2,013	3,644	2,963	1,863	1,743	1,798
Philippines	939	1,313	925	946	1,581	309
Korea, R. of	1,260	2,718	2,115	1,771	1,065	606
India	680	604	283	492	698	822
Thailand	4(10)	10	6	3	510	713
Singapore	<u>12</u>	<u>32</u>	<u>31</u>	<u>43</u>	<u>105</u>	<u>449(3)</u>
Total Restrained	9,937	16,113	11,219	8,568	8,637	9,661(4+20)

**DRESSES, SKIRTS, SUITS & CO-ORDINATES
ATHLETIC SUITS OR SETS, SHORT SETS**

IMPORTS (Continued)

CONTROL NO. 42

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>UNRESTRAINED</u>	--- '000 garments ---				
China, P. R. of	236	1,513	179	86	1,162
Poland	21	51	67	98	482
Brazil	n/a	171	7	9	177
Barbados	n/a	89	99	110	163
Romania	84	40	62	3	133
Macao	-	8	2	neg	40
Leew-Wind	n/a	-	-	-	33
Hungary	-	2	5	neg	32
Thailand	n/a(10)	-	-	neg	31
Sri Lanka	-	-	1	8	23
El Salvador	n/a	-	neg	neg	21
Pakistan	38	46	25	12	20
Haiti	n/a	-	-	-	11
Malta	n/a	10	neg	5	8
Afghanistan	n/a	18	20	8	5
Mexico	n/a	78	4	3	5
Morocco	n/a	21	6	8	4
Indonesia	n/a	-	-	neg	4
Uruguay	n/a	5	1	-	3
Turkey	n/a	8	1	-	2
Malaysia	-	-	3	2	2
Bolivia	n/a	16	7	3	2
Peru	n/a	-	neg	neg	2
Korea, North	n/a	-	-	-	1
Colombia	n/a	22	3	neg	1
Ecuador	n/a	5	6	3	1
Bulgaria	-	-	-	-	neg
Cyprus	n/a	-	1	1	neg
Iran	n/a	-	-	-	neg
Egypt	n/a	-	-	1	neg
Chile	n/a	-	-	-	neg
Jamaica	n/a	-	neg	neg	neg
Guatemala	n/a	6	1	1	neg
Czechoslovakia	n/a	4	3	-	-
Togo	-	-	-	11	-
Guyana	n/a	-	neg	-	-
Argentina	n/a	7	1	neg	-
Other	n/a	-	-	neg	neg
Total Unrestrained					
Low-Cost	379	2,120	504	372	2,368

DRESSES, SKIRTS, SUITS & CO-ORDINATES
ATHLETIC SUITS OR SETS, SHORT SETS

IMPORTS (Continued)

CONTROL NO. 42

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.	1,611	1,622	1,502	1,489	1,750
France	410	786	432	588	476
Italy	400	483	383	463	371
Japan	1,126	877	803	451	318
United Kingdom	350	418	253	256	212
Germany, West	100	181	137	111	114
Finland	n/a	29	21	29	46
Austria	n/a	78	27	11	32
Sweden	n/a	34	35	31	27
Iceland	n/a	5	8	8	18
Norway	n/a	17	35	19	18
Ireland	n/a	10	7	16	17
Netherlands	n/a	32	17	12	12
Switzerland	n/a	25	1	20	11
New Zealand	n/a	-	1	1	6
Denmark	n/a	8	10	9	4
South Africa	n/a	1	3	2	4
Belgium	n/a	7	6	2	2
Australia	n/a	1	3	neg	2
Total Developed	3,997	4,614	3,715	3,518	3,440
<u>OTHER</u>					
Spain	n/a	82	39	50	68
Israel	n/a	376	154	71	68
Portugal	n/a	32	9	17	36
Greece	n/a	44	34	26	25
Yugoslavia	n/a	11	23	8	neg
Total Other	n/a	545	259	172	197
TOTAL ALL SOURCES	14,459	23,391	15,697	12,629	14,641

Totals may not add due to rounding.

DRESSES - WOMEN'S, GIRLS'

APPARENT CANADIAN MARKET

CONTROL NO. 42.1

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	13,535	11,947	11,712	14,229	12,408
Less Exports ⁽¹⁾	<u>48</u>	<u>50</u>	<u>87</u>	<u>74</u>	<u>57</u>
Net Domestic Shipments	13,487	11,897	11,625	14,155	12,351
Imports	<u>2,337</u>	<u>3,116</u>	<u>2,403</u>	<u>2,426</u>	<u>2,303</u>
Apparent Canadian Market	15,824	15,013	14,028	16,581	14,654
Share of Market held by	--- percent ---				
Net Domestic Shipments	85	79	83	85	84
Imports	15	21	17	15	16

DRESSES - WOMEN'S, GIRLS'

IMPORTS

CONTROL NO. 42.1

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>		--- '000 garments ---			
Hong Kong		999	906	788	586
India		315	173	258	346
Taiwan		391	283	319	240
Korea, R. of		28	25	70	63
Singapore		-	5	27	29
Thailand		2	2	1	14
Philippines		34	65	3	10
Total Restrained	-	1,769	1,459	1,466	1,288

UNRESTRAINED LOW-COST

Poland	-	-	9	28
El Salvador	-	neg	-	20
Sri Lanka	-	1	6	18
Afganistan	14	19	7	5
Malta	3	neg	2	4
Morocco	5	3	3	4
China, P.R. of	112	23	3	3
Indonesia	-	-	-	3
Barbados	35	31	neg	2
Malaysia	-	1	1	1
Pakistan	19	4	4	1
Korea, N.	-	-	-	1
Mexico	7	2	2	1
Hungary	-	neg	-	neg
Cyprus	-	-	neg	neg
Turkey	6	neg	-	neg
Egypt	-	-	1	neg
Brazil	24	neg	9	neg
Ecuador	-	-	neg	neg
Jamaica	-	neg	neg	neg
Guatemala	1	neg	1	neg
Romania	-	-	neg	-
Guyana	-	neg	-	-
Argentina	-	neg	-	-
Colombia	-	neg	-	-
Leew-Wind	n/a	neg	-	-
Other	n/a	neg	neg	neg

Total Unrestrained
Low-Cost

-

226

84

48

91

184

(Continued)

DRESSES - WOMEN'S, GIRLS'

IMPORTS

CONTROL NO. 42.1

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.		474	431	375	545
France		166	104	186	115
Italy		147	88	107	67
United Kingdom		140	93	105	64
Japan		82	67	44	48
Germany, West		16	11	34	27
Finland		17	14	15	19
Ireland		3	2	5	6
Netherlands		1	1	neg	4
Sweden		6	7	5	3
Switzerland		7	6	5	3
Denmark		2	4	5	2
Australia		1	neg	-	1
South Africa		neg	1	neg	1
Austria		3	2	2	1
Belgium		2	1	1	neg
Iceland		-	-	neg	-
Total Developed	-	1,067	832	889	906
<u>OTHER</u>					
Israel		36	18	15	9
Greece		6	4	5	4
Spain		3	2	neg	2
Portugal		6	neg	2	neg
Yugoslavia		-	neg	-	neg
Total Other	-	51	24	22	15
*Not available.					
TOTAL ALL SOURCES	-	3,116	2,403	2,426	2,303

Totals may not add due to rounding.

SKIRTS - WOMEN'S, GIRLS'

APPARENT CANADIAN MARKET

CONTROL NO. 42.2

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	5,131	5,097	4,871	5,400	6,334
Less Exports ⁽¹⁾	<u>63</u>	<u>43</u>	<u>30</u>	<u>51</u>	<u>65</u>
Net Domestic Shipments	5,068	5,054	4,841	5,349	6,269
Imports	<u>791</u>	<u>1,298</u>	<u>730</u>	<u>1,081</u>	<u>1,214</u>
Apparent Canadian Market	5,859	6,352	5,571	6,430	7,483
Share of Market held by	--- percent ---				
Net Domestic Shipments	86	80	87	83	84
Imports	14	20	13	17	16

SKIRTS - WOMEN'S, GIRLS'

IMPORTS

CONTROL NO. 42.2

<u>SOURCE</u>	1975*	1976	1977	1978	1979
<u>RESTRAINED</u>			--- '000 garments ---		
Hong Kong		324	203	237	266
India		142	77	160	259
Taiwan		321	79	118	33
Korea, R. of		163	60	74	29
Philippines		1	1	neg	9
Thailand		2	2	2	5
Singapore		-	1	4	2
Total Restrained	-	953	423	595	603
<u>UNRESTRAINED LOW-COST</u>					
China, P.R. of		-	4	-	38
Leew-Wind		-	-	-	33
Macao		8	2	neg	31
Pakistan		6	1	3	17
Hungary		-	-	neg	6
Poland		-	neg	4	6
Sri Lanka		-	-	1	5
El Salvador		-	-	-	1
Mexico		neg	neg	neg	1
Morocco		-	1	neg	neg
Malaysia		-	1	-	neg
Indonesia		-	-	-	neg
Colombia		-	-	-	neg
Ecuador		-	-	-	neg
Guatemala		1	neg	neg	neg
Afganistan		-	1	1	neg
Turkey		-	1	-	-
Cyprus		-	neg	1	-
Bolivia		-	-	neg	-
Brazil		1	2	-	-
Uruguay		-	1	-	-
Total Unrestrained	-	16	14	10	138
Low-Cost	-				

SKIRTS - WOMEN'S, GIRLS'

IMPORTS (Continued)

CONTROL NO. 42.2

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>			--- '000 garments ---		
U.S.A.		78	67	118	165
France		93	103	181	114
Italy		38	32	58	75
United Kingdom		46	40	60	51
Germany, West		5	22	24	34
Finland		2	2	3	7
Sweden		7	5	11	7
Ireland		3	2	4	4
Austria		neg	2	1	4
South Africa		neg	1	neg	2
Japan		15	8	3	2
Belgium		neg	neg	neg	1
Denmark		neg	1	1	1
Switzerland		2	1	3	1
Australia		-	-	-	1
Netherlands		-	-	1	1
Iceland		-	-	-	neg
Total Developed	-	289	286	468	470
<u>OTHER</u>					
Israel		35	6	3	2
Greece		2	1	4	1
Portugal		-	neg	neg	neg
Spain		neg	1	1	neg
Total Other	-	37	8	8	3
TOTAL ALL SOURCES	-	1,298	730	1,081	1,214

*Not available.

Totals may not add due to rounding.

SUITS & CO-ORDINATES

APPARENT CANADIAN MARKET

CONTROL NO. 42.3

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	3,997	4,390	4,004	5,057	5,546
Less Exports ⁽¹⁾	<u>56</u>	<u>59</u>	<u>68</u>	<u>58</u>	<u>63</u>
Net Domestic Shipments	3,941	4,331	3,936	4,999	5,483
Imports ⁽⁸⁾	<u>5,280</u>	<u>10,624</u>	<u>6,579</u>	<u>3,453</u>	<u>3,569</u>
Apparent Canadian Market	9,221	14,955	10,515	8,452	9,052

Share of Market held by	--- percent ---				
Net Domestic Shipments	43	29	37	59	61
Imports	57	71	63	41	39

SUITS & CO-ORDINATES

IMPORTS

CONTROL NO. 42.3

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>		--- '000 garments ---			
Taiwan		3,392	2,367	1,107	875
Korea, R. of		1,699	1,413	800	449
Hong Kong		1,617	1,109	581	412
Thailand		6	2	-	130
India		141	33	66	71
Philippines		193	101	5	41
Singapore		<u>19</u>	<u>16</u>	<u>2</u>	<u>33</u>
Total Restrained	-	7,067	5,041	2,561	2,011

SUITS & CO-ORDINATES

IMPORTS (Continued)

CONTROL NO. 42.3

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>UNRESTRAINED LOW-COST</u>	--- '000 garments ---				
China, P. R. of	1,207	70	45	394	
Poland	51	67	30	295	
Romania	40	62	3	97	
Hungary	2	4	neg	25	
Brazil	132	-	neg	8	
Macao	-	-	-	7	
Malta	7	neg	3	4	
Uruguay	5	neg	-	3	
Bolivia	16	7	3	2	
Peru	-	neg	neg	2	
Morocco	16	1	4	1	
Malaysia	-	1	1	1	
Pakistan	21	20	2	1	
Indonesia	-	-	neg	1	
Ecuador	5	6	3	1	
Barbados	17	47	-	1	
Mexico	70	2	neg	1	
Bulgaria	-	-	-	neg	
Cyprus	-	neg	neg	neg	
Iran	-	-	-	neg	
Turkey	1	-	-	neg	
Chile	-	-	-	neg	
Colombia	22	3	neg	neg	
Czechoslovakia	4	3	-	-	
Togo	-	-	11	-	
Sri Lanka	-	-	1	-	
Afghanistan	4	1	-	-	
Argentina	7	1	neg	-	
Jamaica	-	neg	neg	-	
El Salvador	-	neg	neg	-	
Guatemala	4	-	-	-	
Other	-	-	-	-	
Total Unrestrained Low-Cost	-	1,631	296	106	844

SUITS & CO-ORDINATES

IMPORTS (Continued)

CONTROL NO. 42.3

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.		516	377	223	200
Italy		185	103	179	129
France		441	194	144	120
United Kingdom		173	103	50	70
Japan		149	204	69	60
Germany, West		109	72	26	40
Iceland		5	8	8	17
Sweden		20	23	15	17
Austria		52	20	5	13
Norway		17	35	15	13
Finland		11	4	6	8
Ireland		4	2	6	6
Switzerland		16	14	10	4
Netherlands		5	3	3	3
Belgium		2	2	1	1
South Africa		1	1	2	1
Australia		neg	2	neg	1
Denmark		5	4	2	neg
New Zealand		-	1	-	neg
Total Developed	-	1,711	1,172	764	703
<u>OTHER</u>					
Israel		180	43	12	6
Portugal		6	2	1	2
Greece		11	4	neg	2
Spain		15	6	2	1
Yugoslavia		1	14	2	-
Total Other	-	213	69	17	11
TOTAL ALL SOURCES		10,624	6,579	3,453	3,569

*Not available.

Totals may not add due to rounding.

ATHLETIC SUITS OR SETS -
WOMEN'S, GIRLS', MEN'S, BOYS'

APPARENT CANADIAN MARKET

CONTROL NO. 42,4

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	4,336	4,543	4,574	5,088	4,720
Less Exports ⁽¹⁾	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>
Net Domestic Shipments	4,336	4,543	4,574	5,088	4,720
Imports ⁽⁸⁾	<u>880</u>	<u>465</u>	<u>453</u>	<u>1,401</u>	<u>2,201</u>
Apparent Canadian Market	5,216	5,008	5,027	6,489	6,921
Share of Market held by	--- percent ---				
Net Domestic Shipments	83	91	91	78	68
Imports	17	9	9	22	32

ATHLETIC SUITS OR SETS -
WOMEN'S, GIRLS', MEN'S, BOYS'

IMPORTS

CONTROL NO. 42.4

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>		--- '000 garments ---			
Taiwan		145	168	226	394
Thailand		-	-	-	361
Korea, R. of		16	2	473	253
Hong Kong		59	neg	50	34
Singapore		-	-	-	16
Philippines		-	-	-	2
India		<u>5</u>	<u>-</u>	<u>neg</u>	<u>neg</u>
Total Restrained	-	225	170	749	1,060
<u>UNRESTRAINED LOW-COST</u>					
China, P. R. of		-	4	2	244
Poland		-	-	55	152
Barbados		-	-	75	111
Romania		-	-	-	36
Hungary		-	-	-	1
Peru		-	-	-	neg
Pakistan		-	-	2	-
Ecuador		<u>-</u>	<u>neg</u>	<u>-</u>	<u>-</u>
Total Unrestrained Low-Cost	-	-	4	134	544

ATHLETIC SUITS OR SETS -
WOMEN'S, GIRLS', MEN'S, BOYS'

IMPORTS (Continued)

CONTROL NO. 42.4

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>					
				--- '000 garments ---	
U.S.A.		169	231	432	539
Japan		-	8	43	15
France		38	8	1	12
Austria		-	-	2	11
Norway		-	-	3	5
New Zealand		-	-	1	5
United Kingdom		28	5	8	3
Italy		5	25	8	2
Finland		-	-	neg	1
Germany, West		-	neg	12	1
Switzerland		-	1	neg	1
Belgium		-	-	-	neg
Denmark		-	-	neg	neg
Sweden		-	-	neg	neg
Total Developed	-	240	278	510	595
<u>OTHER</u>					
Yugoslavia		-	-	6	neg
Total Other	-	-	-	6	neg
TOTAL ALL SOURCES	-	465	453	1,401	2,201

*Not available.

Totals may not add due to rounding.

DRESSES, SKIRTS, SUITS,
CO-ORDINATES, SHORTS SETS, ETC. -
CHILDREN'S AND INFANTS' (0-6x)

APPARENT CANADIAN MARKET

CONTROL NO. 42.5

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	8,551	6,502	6,412	7,413	6,503
Less Exports ⁽¹⁾	<u>253</u>	<u>252</u>	<u>186</u>	<u>186</u>	<u>205</u>
Net Domestic Shipments	8,298	6,250	6,226	7,227	6,298
Imports ⁽⁸⁾	<u>5,171</u>	<u>7,889</u>	<u>5,533</u>	<u>4,269</u>	<u>5,354</u>
Apparent Canadian Market	13,469	14,139	11,759	11,496	11,652
Share of Canadian Market	--- percent ---				
Net Domestic Shipments	62	44	53	63	54
Imports	38	56	47	37	46

DRESSES, SKIRTS, SUITS
CO-ORDINATES, SHORT SETS, ETC. -
CHILDREN'S AND INFANTS' (0-5x)

IMPORTS

CONTROL NO. 42.5

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>					
		--- '000 garments ---			
Philippines		1,084	758	937	1,520
Taiwan		3,543	2,000	1,680	1,392
Hong Kong		645	744	206	445
Korea, R. of		813	616	354	271
Singapore		13	9	10	25
India		<u>-</u>	<u>-</u>	<u>8</u>	<u>22</u>
Total Restrained	-	6,098	4,127	3,195	3,675
<u>UNRESTRAINED LOW-COST</u>					
China, P.R. of		193	79	36	483
Brazil		15	5	-	169
Barbados		37	21	34	49
Thailand		-	-	neg	31
Haiti		-	-	-	11
Macao		-	-	-	3
Turkey		-	-	-	1
Pakistan		-	-	1	1
Mexico		-	neg	neg	1
Malta		-	neg	-	neg
Afghanistan		-	-	-	neg
Peru		-	-	-	neg
Hungary		-	1	-	-
Romania		-	neg	-	-
Malaysia		-	-	neg	-
Bolivia		-	-	neg	-
Guatemala		<u>-</u>	<u>-</u>	<u>neg</u>	<u>-</u>
Total Unrestrained Low-Cost	-	245	106	71	749

DRESSES, SKIRTS, SUITS,
CO-ORDINATES, SHORT SETS, ETC. -
CHILDREN'S AND INFANTS' (0-6x)

IMPORTS (Continued)

CONTROL No. 42.5

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.		384	400	342	299
Japan		631	517	292	194
France		48	23	75	113
Italy		108	134	111	97
United Kingdom		31	12	33	24
Finland		-	neg	4	12
Germany, West		51	32	14	12
Netherlands		26	13	8	4
Austria		22	3	1	2
Switzerland		1	6	2	2
Ireland		-	neg	1	1
Belgium		2	2	-	neg
Denmark		-	1	1	neg
Norway		-	-	-	neg
Sweden		-	neg	neg	neg
South Africa		-	-	-	neg
Australia		-	-	-	neg
New Zealand		-	-	-	neg
Total Developed	-	1,304	1,143	884	760
<u>OTHER</u>					
Spain		63	30	46	64
Israel		125	88	40	51
Portugal		20	7	14	33
Greece		25	24	17	19
Yugoslavia		10	8	-	-
Total Other	-	243	157	117	167
TOTAL ALL SOURCES	-	7,889	5,533	4,269	5,354

*Not available.

Totals may not add due to rounding.

DEFINITION

Women's and girls' foundation garments including brassieres, girdles, corselettes, corsets and pantie girdles.

SECTOR PROFILE

- Based on the latest statistics available (1977), the foundation garment industry is comprised of 13 firms which together account for 28 establishments.
- Total employment in this sector decreased from 3,730 in 1976 to 3,407 in 1977.
- Hourly earnings for production workers increased from \$3.48 in 1976 to \$3.83 in 1977 to \$4.05 in 1978.
- Regionally speaking, the industry is located primarily in Québec (64 percent) and Ontario (32 percent).
- Major centres of production in order of importance are Montréal, Toronto and Québec City.
- 5 firms in the sector are multi-nationals.
- Firms producing foundations garments also make swimwear and lingerie.
- Total sales of domestic producers were \$88 million in 1978.

FOUNDATION GARMENTS

APPARENT CANADIAN MARKET

CONTROL NO. 43

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	22,632	20,156	20,836	22,052	21,360
Less Exports ⁽¹⁾	<u>193</u>	<u>234</u>	<u>156</u>	<u>121</u>	<u>132</u>
Net Domestic Shipments	22,439	19,922	20,680	21,931	21,228
Imports	<u>2,503</u>	<u>3,592</u>	<u>2,643</u>	<u>2,030</u>	<u>2,552</u>
Apparent Canadian Market	24,942	23,514	23,323	23,961	23,780

Share of Market held by	--- percent ---				
Net Domestic Shipments	90	85	89	92	89
Imports	10	15	11	8	11

FOUNDATION GARMENTS

IMPORTS

CONTROL NO. 43

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	Restraint levels <u>1981</u>
<u>RESTRAINED</u>	--- '000 garments ---					
Philippines	727	1,567	793	693	810	1,461
Hong Kong	588	850	621	487	587	764
Korea, R. of	-	26	7	-	-	90(18)
Taiwan	<u>23</u>	<u>6</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>26</u>
Total Restrained	1,338	2,449	1,421	1,180	1,397	2,341
<u>UNRESTRAINED LOW-COST</u>						
Mexico	-	-	49	4	17	
Puerto Rico	-	9	-	neg	15	
Barbados	-	-	-	-	2	
Brazil	9	-	-	-	neg	
Venezuela	-	-	-	7	-	
Jamaica	-	70	10	-	-	
Trinidad	<u>-</u>	<u>12</u>	<u>9</u>	<u>-</u>	<u>-</u>	
Total Unrestrained						
Low-Cost	9	91	68	11	34	

FOUNDATION GARMENTS

IMPORTS (Continued)

CONTROL NO. 43

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.	579	566	592	545	619
France	154	60	133	120	254
United Kingdom	294	363	391	104	145
Sweden	31	11	14	52	37
Switzerland	21	10	4	1	19
Austria	-	neg	neg	-	8
Germany, West	5	38	11	11	7
Italy	neg	-	-	3	7
Netherlands	-	neg	-	-	2
Belgium	1	-	-	-	-
Japan	48	-	-	-	-
Australia	<u>3</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Developed	1,136	1,048	1,145	836	1,098
<u>OTHER</u>					
Yugoslavia	-	-	-	-	18
Portugal	3	-	-	-	4
Israel	15	-	2	-	1
Spain	-	5	8	-	-
Total Other	18	5	10	-	23
TOTAL OTHER SOURCES	2,503	3,592	2,643	2,030	2,552

Totals may not add due to rounding.

DEFINITION

Swimsuits- men's, boys', women's, girls', children's and infants', wholly or mainly by weight of cotton, man-made fibres or wool, or blends thereof, being garments normally worn for swimming and bathing. Included are swimming trunks and bathing suits.

SECTOR PROFILE

- Based on the latest statistics available (1976) the Canadian swimsuit industry is comprised of 22 firms.
- Regionally speaking the industry is located primarily in Québec (68 percent) and Ontario (29 percent).
- Major centres of production in order of importance are Montréal and Toronto.
- There is no published data available on total employment in this sector. From a survey of 6 producers, accounting for 57 percent of domestic shipments, production employees were reported as being 695 in 1978.
- Domestic shipments of swimsuits decreased by 10 percent in 1979 over 1978. 1979 followed an above average shipment year in 1978 and was slightly above 1975 levels.

SWIMSUITS

APPARENT CANADIAN MARKET

CONTROL NO. 44

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	3,778	3,490	3,788	4,265	3,854
Less Exports ⁽¹⁾	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>
Net Domestic Shipments	3,778	3,490	3,788	4,265	3,854
Imports	<u>2,979</u>	<u>3,705</u>	<u>3,105</u>	<u>2,549</u>	<u>2,954</u>
Apparent Canadian Market	6,757	7,195	6,893	6,814	6,808
Share of Market held by	--- percent ---				
Net Domestic Shipments	56	49	55	63	57
Imports	44	51	45	37	43

SWIMSUITS

IMPORTS

CONTROL NO. 44

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	Restraint levels <u>1981</u>
<u>RESTRAINED</u>	--- '000 garments ---					
Taiwan	1,195	1,346	1,316	1,131	1,324	1,343
Hong Kong	646	1,060	794	575	994	817
Korea, R. of	<u>13</u>	<u>74</u>	<u>82</u>	<u>70</u>	<u>6</u>	<u>56</u>
Total Restrained	1,854	2,480	2,192	1,776	2,324	2,216
<u>UNRESTRAINED LOW-COST</u>						
Philippines	1	1	12	18	19	
Brazil	25	neg	neg	6	3	
Peru	-	-	-	-	1	
Singapore	-	-	-	-	neg	
Barbados	-	-	-	-	neg	
Hungary	-	8	-	-	-	
Morocco	2	-	-	-	-	
India	neg	-	-	-	-	
Venezuela	neg	neg	-	-	-	
Jamaica	neg	-	-	-	-	
Other	<u>neg</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	
Total Unrestrained Low-Cost	28	9	12	24	23	

(Continued)

SWIMSUITS

IMPORTS (Continued)

CONTROL NO. 44

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.	524	705	494	380	325
France	188	110	100	106	93
Italy	62	88	96	68	88
United Kingdom	79	114	66	72	24
Sweden	33	6	6	14	9
Germany, West	26	14	13	10	8
Austria	1	6	6	-	4
Switzerland	2	3	1	1	2
Finland	1	1	-	2	2
Australia	1	1	1	neg	neg
Netherlands	2	1	1	1	neg
Belgium	neg	-	-	neg	neg
Japan	neg	-	8	7	-
Denmark	<u>neg</u>	<u>neg</u>	<u>1</u>	<u>-</u>	<u>-</u>
Total Developed	919	1,049	793	661	555
<u>OTHER</u>					
Israel	124	138	95	78	50
Spain	52	27	11	8	3
Greece	<u>2</u>	<u>2</u>	<u>3</u>	<u>-</u>	<u>-</u>
Total Other	178	167	109	86	53
 TOTAL ALL SOURCES	 2,979	 3,705	 3,105	 2,549	 2,954

Totals may not add due to rounding.

DEFINITION

Underwear - Men's, boys', women's, girls', children's and infants' which is wholly or mainly by weight of cotton, man-made fibres or wool, or blends thereof, including apparel commonly referred to as slips and bloomers.

SECTOR PROFILE

- Based on the latest statistics available (1976) the underwear industry is comprised of 53 establishments.
- Regionally speaking the industry is located primarily in Québec (72 percent) and Ontario (25 percent).
- Montréal is the major centre of production but smaller urban centres in Ontario and the eastern townships of Québec are also important centres of production.
- Based on analysis, 78 percent of all underwear was knitted and 22 percent woven. The same analysis revealed 52 percent was women's and girls', 43 percent men's and boys' and 5 percent children's and infants'.
- There are no published data on total employment in this sector. From a survey of 18 firms in 1978, representing 58 percent of domestic shipments of underwear, production employees were reported as being 3,651.

UNDERWEARAPPARENT CANADIAN MARKETCONTROL NO. 45

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	92,070	100,200	97,521	107,588	107,877
Less Exports ⁽¹⁾	<u>77</u>	<u>186</u>	<u>185</u>	<u>163</u>	<u>184</u>
Net Domestic Shipments	91,993	100,014	97,336	107,425	107,693
Imports	<u>14,543</u>	<u>21,963</u>	<u>13,877</u>	<u>12,975</u>	<u>14,648</u>
Apparent Canadian Market	106,536	121,977	111,213	120,400	122,341
Share of Market held by	--- percent ---				
Net Domestic Shipments	86	82	88	89	88
Imports	14	18	12	11	12

UNDERWEAR

IMPORTS

CONTROL NO. 45

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	Restraint levels <u>1981</u>
<u>RESTRAINED</u>	--- '000 garments ---					
Hong Kong	6,064	10,927	6,261	6,014	5,156	6,588
Taiwan	1,584	3,364	2,356	2,243	2,299	2,395
Philippines	520	188	208	320	237	247
Korea, R. of	32	15	908	288	96	(18)
Total Restrained	8,200	14,494	9,733	8,865	7,788	9,230
<u>UNRESTRAINED LOW-COST</u>						
Poland	180	36	76	136	1,608	
China, P.R. of	229	525	215	304	1,111	
Mexico	35	110	239	209	178	
Pakistan	517	362	141	74	138	
Brazil	24	47	17	11	68	
Singapore	-	-	-	1	30	
India	1	8	-	-	8	
Malta	-	27	-	-	neg	
Czechoslovakia	6	26	-	-	-	
Romania	-	162	13	117	-	
Morocco	-	22	18	8	-	
Venezuela	-	-	1	8	-	
Jamaica	-	97	-	-	-	
Total Unrestrained Low-Cost	992	1,422	720	868	3,141	

UNDERWEARCONTROL NO. 45IMPORTS (Continued)

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>			---	'000 garments	---
Italy	516	802	711	643	1,317
U.S.A.	744	1,197	574	685	881
United Kingdom	1,316	1,403	682	816	586
France	762	452	631	439	322
Germany, West	21	29	44	59	23
Norway	13	15	38	40	15
Netherlands	52	51	29	8	7
Japan	4	105	18	3	7
New Zealand	-	-	-	-	4
Denmark	102	17	10	-	3
Finland	neg	2	36	3	3
Switzerland	6	7	4	3	3
Sweden	1	5	6	1	1
Belgium	1	3	neg	neg	neg
Austria	6	8	10	6	-
South Africa	-	2	-	-	-
Australia	4	4	3	6	-
Total Developed	3,548	4,102	2,796	2,712	3,172
<u>OTHER</u>					
Spain	832	1,307	622	499	515
Portugal	34	1	-	neg	25
Greece	23	9	5	20	3
Israel	<u>912</u>	<u>626</u>	<u>-</u>	<u>10</u>	<u>3</u>
Total Other	1,801	1,943	627	529	546
TOTAL ALL SOURCES	14,543	21,963	13,877	12,975	14,648

Totals may not add due to rounding.

DEFINITION

- 46.1 Jackets (excluding leather jackets) - an outerwear garment covering the upper part of the body, not extending to the knees, including woven ponchos, vests and boleros, not lined or designed to protect against the cold.
- 46.2 Overcoats and Topcoats - an outerwear garment extending to the knee or below, excluding rainwear and leather coats.
- 46.3 Professional and Shopcoats - one piece garments, including barber coats, clinical coats, medical coats, laboratory coats and surgical gowns.

SECTOR PROFILE

- Based on the latest statistics available the Canadian industry as defined is comprised of 289 firms.
- Regionally speaking, the industry is located primarily in Québec (52 percent) and Ontario (25 percent).
- Major centres of production in order of importance are Montréal and Toronto.
- In 1979, outer-jackets accounted for 41 percent of total domestic shipments in this sector; overcoats and topcoats 35 percent; and professional and shopcoats 24 percent.
- There is no published data available on total employment in this sector. From a survey of 91 companies in 1978, representing 43 percent of domestic shipments, production employees were reported as being 1,982.
- Firms in this industry also produce pants and raincoats.

- The 19 percent increase in domestic shipments of overcoats and topcoats (Control No. 46.2) in 1979 over 1978 was offset by a comparable decrease in shipments of leather coats and jackets (Control No. 48). The combined increase in domestic shipments of both items (Control Nos. 46.2 and 48) in 1979 over 1978 was 1 percent. Compared to 1975, combined 1979 domestic shipments were lower by 6 percent.
- Professional and shopcoat (Control No. 46.3) domestic shipments increased by 17 percent in 1979 over 1978 but were still below 1975 levels.

OUTER-JACKETS

APPARENT CANADIAN MARKET

CONTROL NO. 46

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	7,994	10,427	8,408	8,474	9,667
Less Exports ⁽¹⁾	<u>462</u>	<u>366</u>	<u>314</u>	<u>214</u>	<u>249</u>
Net Domestic Shipments	7,532	10,061	8,094	8,260	9,418
Imports ⁽⁶⁾	<u>5,000</u>	<u>8,492</u>	<u>4,850</u>	<u>4,535</u>	<u>4,946</u>
Apparent Canadian Market	12,532	18,553	12,944	12,795	14,364
	--- percent ---				
Share of Market held by					
Net Domestic Shipments	60	54	63	65	66
Imports	40	46	37	35	34

OUTER-JACKETS

IMPORTS

CONTROL NO. 46

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	Restraint levels <u>1981</u>
<u>RESTRAINED</u>	--- '000 garments ---					
Korea, R. of	2,103	3,738	2,499	2,121	1,395	2,726
Hong Kong	744	1,163	467	513	491	871
China, P. R. of	501(10)	859	252	99	377	610(5)
Taiwan	420	1,019	470	497	368	475
Romania	173	83	133	37	174	378
Bulgaria	-	18	13	52	103	169
India	36(10)	35	10	14	75	318
Sri Lanka	-	-	-	-	71	341
Singapore	30(10)	2	4	neg	53	337(3)
Macao	<u>24</u>	<u>9</u>	<u>-</u>	<u>46</u>	<u>35</u>	<u>169</u>
Total Restrained	4,031	6,926	3,848	3,379	3,142	6,394(4)

OUTER-JACKETS

IMPORTS (Continued)

CONTROL NO. 46

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>UNRESTRAINED LOW-COST</u>	--- '000 garments ---				
Poland	16	12	1	33	184
China, P. R. of	n/a (10)	155	83	11	131
Brazil	89	46	33	30	113
Philippines	59	101	37	6	90
Hungary	4	4	3	2	86
Thailand	18	6	25	6	62
Leew-Wind	-	-	-	-	50
Pakistan	2	9	15	14	13
Malaysia	neg	2	1	neg	12
Uruguay	-	18	neg	neg	7
India	n/a (10)	9	1	23	6
Argentina	-	neg	neg	neg	6
Czechoslovakia	21	9	3	neg	4
Afghanistan	1	neg	1	1	3
Mexico	40	53	10	7	2
Ecuador	-	-	-	1	1
Peru	neg	-	neg	1	1
Bolivia	neg	-	-	1	1
Malta	-	-	-	neg	neg
Colombia	6	4	neg	1	neg
Guatemala	neg	neg	neg	1	neg
Korea, North	-	13	1	-	-
Puerto Rico	-	-	2	-	-
El Salvador	-	-	1	-	-
Panama	2	-	-	-	-
Turkey	1	1	-	neg	-
Morocco	1	neg	-	neg	-
Chile	1	-	-	-	-
Singapore	n/a (10)	-	-	neg	-
Indonesia	-	-	-	neg	-
Total Unrestrained Low-Cost	261	442	217	138	772

OUTER-JACKETS

IMPORTS (Continued)

CONTROL NO. 46

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.	362	732	384	415	512
United Kingdom	96	123	143	168	137
France	36	45	39	121	108
Italy	11	17	14	63	107
Germany, West	20	30	30	45	45
Japan	39	62	77	29	24
Iceland	2	1	1	11	22
Ireland	2	4	2	10	12
Sweden	6	5	4	24	11
Finland	2	3	3	7	7
Belgium	19	3	2	22	5
Austria	3	2	2	4	4
South Africa	-	neg	2	2	4
Netherlands	3	1	neg	2	4
Denmark	3	4	2	4	3
Switzerland	2	2	1	5	3
New Zealand	1	neg	neg	1	1
Australia	1	1	neg	1	neg
Norway	<u>3</u>	<u>1</u>	<u>1</u>	<u>1</u>	<u>neg</u>
Total Developed	611	1,036	707	935	1,009
<u>OTHER</u>					
Spain	93	82	68	75	20
Israel	3	4	8	6	3
Portugal	-	-	neg	neg	2
Yugoslavia	1	3	2	neg	neg
Greece	<u>-</u>	<u>neg</u>	<u>-</u>	<u>3</u>	<u>neg</u>
Total Other	97	89	78	84	25
 TOTAL ALL SOURCES	 5,000	 8,492	 4,850	 4,535	 4,946

Totals may not add due to rounding.

JACKETS - WOMEN'S, GIRLS', MEN'S,
BOYS', CHILDREN'S AND INFANTS' (0-6x)

APPARENT CANADIAN MARKET

CONTROL NO. 46.1

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	3,651	5,001	3,526	3,682	3,995
Less Exports ⁽¹⁾	<u>28</u>	<u>36</u>	<u>25</u>	<u>21</u>	<u>25</u>
Net Domestic Shipments	3,623	4,965	3,501	3,661	3,970
Imports ⁽⁶⁾	<u>5,030</u>	<u>7,096</u>	<u>3,726</u>	<u>3,209</u>	<u>3,477</u>
Apparent Canadian Market	8,653	12,061	7,227	6,870	7,447
Share of Market held by	--- percent ---				
Net Domestic Shipments	42	41	48	53	53
Imports	58	59	52	47	47

JACKETS - WOMEN'S, GIRLS', MEN'S,
BOYS', CHILDREN'S AND INFANTS' (0-6x)

IMPORTS

CONTROL NO. 46.1

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
Korea, R. of		3,357	2,204	1,729	1,129
Hong Kong		955	332	329	378
China, P. R. of		859	252	99	377
Taiwan		834	357	325	293
Romania		37	50	12	96
India		35	10	14	75
Sri Lanka		-	-	-	71
Singapore		2	4	neg	53
Macao		9	-	46	35
Bulgaria		-	-	-	-
Total Restrained	-	6,088	3,209	2,554	2,507

UNRESTRAINED LOW-COST

Brazil		46	33	30	113
Philippines		101	37	3	84
Hungary		neg	-	2	83
Poland		2	-	8	73
Thailand		6	25	6	58
Leew-Wind		-	-	-	21
Malaysia		2	-	neg	12
Czechoslovakia		9	3	neg	3
Afghanistan		neg	1	1	3
Mexico		53	10	6	2
Ecuador		-	-	1	1
Peru		-	neg	1	1
Uruguay		16	-	neg	1
Pakistan		neg	neg	neg	neg
Bolivia		-	-	1	neg
Colombia		4	neg	neg	neg
Guatemala		neg	neg	1	neg
Malta		-	-	neg	-
Turkey		1	-	-	-
Morocco		neg	-	neg	-
Korea, North		13	1	-	-
Argentina		neg	neg	neg	-
El Salvador		-	neg	-	-
Puerto Rico		-	2	-	-
Other		-	-	neg	neg
Total Unrestrained Low-Cost	-	253	112	60	455

JACKETS - WOMEN'S, GIRLS', MEN'S,
BOYS', CHILDREN'S AND INFANTS' (0-6x)

IMPORTS (Continued)

CONTROL NO. 46.1

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>		--- '000 garments ---			
U.S.A.		541	196	199	219
Italy		5	4	43	72
France		20	16	91	71
United Kingdom		37	47	78	65
Germany, West		6	2	16	19
Japan		56	61	20	11
Iceland		neg	1	7	10
Ireland		neg	neg	6	7
Belgium		neg	neg	19	4
Sweden		1	2	20	4
South Africa		neg	1	2	4
Finland		neg	1	3	3
Netherlands		1	neg	neg	2
Austria		1	neg	1	1
Denmark		2	1	2	1
Switzerland		1	1	2	1
New Zealand		neg	neg	1	1
Norway		1	1	1	neg
Australia		<u>1</u>	<u>neg</u>	<u>1</u>	<u>neg</u>
Total Developed Sources	-	673	334	512	495
<u>OTHER</u>					
Spain		80	68	75	19
Israel		2	5	5	3
Yugoslavia		1	-	-	neg
Portugal		-	-	-	neg
Greece		<u>neg</u>	<u>-</u>	<u>3</u>	<u>neg</u>
Total Other	-	83	73	83	22
 TOTAL ALL SOURCES	-	 7,096	 3,726	 3,209	 3,177

*Not available.

Totals may not add due to rounding

OVERCOATS AND TOPCOATS -
WOMEN'S, GIRLS', MEN'S, BOYS',
CHILDREN'S AND INFANTS' (0-6x)

APPARENT CANADIAN MARKET

CONTROL NO. 46.2

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	2,055	2,326	2,393	2,782	3,321
Less Exports ⁽¹⁾	<u>397</u>	<u>267</u>	<u>231</u>	<u>153</u>	<u>162</u>
Net Domestic Shipments	1,658	2,059	2,162	2,629	3,159
Imports	<u>750</u>	<u>1,123</u>	<u>873</u>	<u>998</u>	<u>1,102</u>
Apparent Canadian Market	2,408	3,182	3,035	3,627	4,261

Share of Market held by	--- percent ---				
Net Domestic Shipments	69	65	71	72	74
Imports	31	35	29	28	26

OVERCOATS AND TOPCOATS -
WOMEN'S, GIRLS', MEN'S, BOYS'
CHILDREN'S AND INFANTS' (0-6x)

IMPORTS

CONTROL NO. 46.2

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>		--- '000 garments ---			
Korea, R. of		380	294	370	244
Bulgaria		18	13	52	103
Hong Kong		149	111	111	81
Romania		45	83	26	78
Taiwan		180	90	143	71
Macao		<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Restrained	-	772	591	702	577
<u>UNRESTRAINED LOW-COST</u>					
China, P. R. of		91	30	6	114
Poland		10	1	26	103
Leew-Wind		-	-	-	29
India		9	1	11	6
Uruguay		2	neg	neg	6
Argentina		-	neg	neg	5
Philippines		-	-	3	4
Thailand		-	-	-	4
Hungary		3	3	neg	2
Czechoslovakia		-	-	-	1
Malta		-	-	neg	neg
Afghanistan		-	neg	neg	neg
Bolivia		-	-	-	neg
Ecuador		-	-	neg	neg
Peru		-	-	neg	neg
Mexico		-	neg	neg	neg
Iran		-	neg	-	-
Turkey		-	-	neg	-
Malaysia		-	1	-	-
Pakistan		1	2	2	-
Singapore		-	-	neg	-
Colombia		-	neg	-	-
El Salvador		-	neg	-	-
Other		<u>-</u>	<u>-</u>	<u>-</u>	<u>neg</u>
Total Unrestrained Low-Cost	-	116	38	48	274

OVERCOATS AND TOPCOATS -
WOMEN'S, GIRLS', MEN'S, BOYS',
CHILDREN'S AND INFANTS' (0-6x)

IMPORTS (Continued)

CONTROL NO. 46.2

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>		--- '000 garments ---			
United Kingdom		85	96	85	68
U.S.A.		62	54	57	50
France		22	21	28	33
Germany, West		24	28	29	26
Italy		10	10	18	25
Japan		5	14	2	13
Iceland		1	neg	3	8
Sweden		4	2	4	7
Ireland		3	2	3	5
Finland		2	2	3	4
Austria		1	2	3	3
Netherlands		neg	neg	1	2
Belgium		3	2	3	1
Denmark		2	1	2	1
Switzerland		2	1	3	1
Norway		neg	neg	neg	neg
Australia		-	neg	-	neg
New Zealand		-	neg	neg	neg
South Africa		-	1	-	-
Total Developed	-	226	236	244	247
<u>OTHER</u>					
Portugal		-	neg	neg	2
Israel		2	3	1	1
Spain		2	neg	neg	1
Greece		neg	neg	1	neg
Yugoslavia		2	2	neg	neg
Total Other	-	6	5	2	4
TOTAL ALL SOURCES	-	1,123	873	998	1,102

*Not available.

Totals may not add due to rounding.

PROFESSIONAL & SHOPCOATS -
WOMEN'S, GIRLS', MEN'S, BOYS'

APPARENT CANADIAN MARKET

CONTROL NO. 46.3

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	2,288	3,100	2,489	2,010	2,351
Less Exports ⁽¹⁾	<u>37</u>	<u>63</u>	<u>58</u>	<u>40</u>	<u>62</u>
Net Domestic Shipments	2,251	3,037	2,431	1,970	2,289
Imports	<u>220</u>	<u>273</u>	<u>251</u>	<u>328</u>	<u>367</u>
Apparent Canadian Market	2,471	3,310	2,682	2,298	2,656
Share of Market held by	--- percent ---				
Net Domestic Shipments	91	92	91	86	86
Imports	9	8	9	14	14

PROFESSIONAL & SHOPCOATS -
WOMEN'S, GIRLS', MEN'S, BOYS'

IMPORTS

CONTROL NO. 46.3

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>		--- '000 garments ---			
Hong Kong		60	24	73	32
Korea, R. of		-	neg	21	21
Taiwan		5	22	29	4
Romania		-	-	-	-
Bulgaria		-	-	-	-
Macao		-	-	-	-
Total Restrained	-	65	46	123	57
<u>UNRESTRAINED LOW-COST</u>					
China, P. R. of		64	54	5	17
Pakistan		7	13	12	13
Poland		-	-	-	7
Philippines		-	-	neg	1
Argentina		-	-	-	1
Hungary		-	-	-	neg
India		-	-	12	neg
Bolivia		-	-	-	neg
Ecuador		-	-	-	neg
Uruguay		-	-	-	neg
Mexico		-	-	neg	neg
Indonesia		-	-	neg	-
Total Unrestrained Low-Cost	-	71	67	29	39

PROFESSIONAL & SHOPCOATS -
WOMEN'S, GIRLS', MEN'S, BOYS'

IMPORTS (Continued)

CONTROL NO. 46.3

<u>SOURCE</u>	<u>1975*</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.		130	134	160	243
Italy		2	neg	2	10
United Kingdom		1	1	5	5
France		2	1	2	4
Iceland		-	-	1	3
Germany, West		1	neg	neg	1
Sweden		-	neg	neg	1
Switzerland		-	neg	1	1
Japan		1	2	6	1
Ireland		-	-	neg	neg
Finland		-	-	-	neg
Netherlands		-	-	neg	neg
Norway		-	-	-	neg
Australia		-	-	-	neg
Denmark		-	-	neg	-
South Africa		-	-	neg	-
Total Developed	-	137	138	177	269
<u>OTHER</u>					
Greece		-	-	neg	neg
Total Other	-	-	-	neg	neg
TOTAL ALL SOURCES	-	273	251	328	367

*Not available.

Totals may not add due to rounding.

STRUCTURED SPORTCOATS, BLAZERS
AND STRUCTURED SUITS

APPARENT CANADIAN MARKET

CONTROL NO. 47

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	3,742	3,705	3,831	3,428	3,751
Less Exports ⁽¹⁾	<u>148</u>	<u>158</u>	<u>108</u>	<u>79</u>	<u>62</u>
Net Domestic Shipments	3,594	3,547	3,723	3,349	3,689
Imports ⁽⁸⁾	<u>569</u>	<u>807</u>	<u>540</u>	<u>677</u>	<u>865</u>
Apparent Canadian Market	4,163	4,354	4,263	4,026	4,554
Share of Market held by	--- percent ---				
Net Domestic Shipments	86	81	87	83	81
Imports	14	19	13	17	19

NOTE: See page 121 for Sector Profile.

STRUCTURED SPORTCOATS & BLAZERS
- MEN'S AND BOYS'

APPARENT CANADIAN MARKET

CONTROL NO. 47.1

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	1,354	1,441	1,294	1,000	1,333
Less Exports ⁽¹⁾	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>	<u>nil</u>
Net Domestic Shipments	1,354	1,441	1,294	1,000	1,333
Imports ⁽⁸⁾	<u>124</u>	<u>163</u>	<u>160</u>	<u>203</u>	<u>292</u>
Apparent Canadian Market	1,478	1,604	1,454	1,203	1,625
Share of Market held by	--- percent ---				
Net Domestic Shipments	92	90	89	83	82
Imports	8	10	11	17	18

NOTE: See page 121 for Sector Profile.

STRUCTURED SPORTCOATS & BLAZERS
- MEN'S AND BOYS'

IMPORTS

CONTROL NO. 47.1

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
Korea, R. of	32	36	74	40	77
Philippines	-	-	-	-	27
Bulgaria	-	-	-	-	26
Poland	-	-	neg	10	25
Hong Kong	12	13	3	10	16
Taiwan	33	55	14	51	13
Hungary	2	2	2	6	6
China, P.R. of	-	-	-	-	2
Singapore	1	1	1	neg	1
Macao	-	-	-	-	1
Romania	<u>14</u>	<u>10</u>	<u>7</u>	<u>-</u>	<u>-</u>
Total Restrained	94	117	101	117	194
<u>UNRESTRAINED LOW-COST</u>					
Sri Lanka	-	-	-	-	8
India	neg	neg	neg	neg	8
Czechoslovakia	6	15	15	10	7
Colombia	-	-	-	-	5
Uruguay	-	neg	-	-	1
Turkey	neg	neg	-	-	-
Pakistan	-	neg	-	-	-
Brazil	-	neg	-	-	-
El Salvador	1	-	-	-	-
Panama	<u>4</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Unrestrained					
Low-Cost	11	15	15	10	29

STRUCTURED SPORTCOATS & BLAZERS
- MEN'S AND BOYS'

IMPORTS (Continued)

CONTROL NO. 47.1

<u>SOURCES</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
France	2	2	8	19	23
Italy	2	3	5	14	19
U.S.A.	2	2	9	28	16
United Kingdom	2	2	3	4	3
Ireland	neg	neg	neg	neg	3
Germany, West	neg	2	1	2	2
Belgium	neg	neg	neg	neg	1
Finland	neg	neg	-	neg	1
Iceland	1	2	1	neg	1
Netherlands	neg	neg	neg	-	1
Japan	6	10	12	2	1
Austria	-	-	-	neg	neg
Denmark	neg	neg	-	-	neg
Sweden	neg	1	1	3	neg
Switzerland	neg	neg	neg	neg	neg
South Africa	2	3	2	2	neg
Australia	-	-	neg	-	-
Total Developed	17	27	42	74	71
<u>OTHER</u>					
Greece	-	-	-	-	neg
Portugal	-	-	-	-	neg
Yugoslavia	neg	1	1	-	neg
Spain	neg	neg	-	1	-
Israel	neg	1	neg	-	-
Total Other	neg	2	1	1	neg
TOTAL ALL SOURCES	124	163	160	203	292

Totals may not add due to rounding.

STRUCTURED SUITS,
- MEN'S AND BOYS'

APPARENT CANADIAN MARKET

CONTROL NO. 47.2

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	2,388	2,264	2,537	2,428	2,418
Less Exports ⁽¹⁾	<u>148</u>	<u>158</u>	<u>108</u>	<u>79</u>	<u>62</u>
Net Domestic Shipments	2,240	2,106	2,429	2,349	2,356
Imports ⁽⁸⁾	<u>445</u>	<u>644</u>	<u>380</u>	<u>474</u>	<u>573</u>
Apparent Canadian Market	2,685	2,750	2,809	2,823	2,929
Share of Market held by	--- percent ---				
Net Domestic Shipments	83	77	86	83	80
Imports	17	23	14	17	20

NOTE: See page 121 for Sector Profile.

STRUCTURED SUITS
- MEN'S & BOYS'

IMPORTS

CONTROL NO. 47.2

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>					
	--- '000 garments ---				
Korea, R. of	170	306	175	238	170
Poland	37	3	20	57	127
Taiwan	28	60	36	97	81
Romania	54	75	40	-	62
Hungary	7	9	6	22	34
Hong Kong	12	66	20	10	15
Bulgaria	-	-	-	-	12
Philippines	6	7	1	1	5
Macao	-	-	-	-	2
Singapore	neg	14	-	-	-
China, P.R. of	<u>12</u>	<u>6</u>	<u>2</u>	<u>-</u>	<u>-</u>
Total Restrained	326	546	300	425	508

UNRESTRAINED LOW-COST

Czechoslovakia	9	9	2	3	7
Colombia	8	8	9	-	4
Brazil	7	10	-	-	neg
Uruguay	-	neg	-	neg	neg
Iran	neg	-	-	-	-
Morocco	neg	neg	-	-	-
India	neg	neg	neg	neg	-
Malaysia	1	neg	neg	-	-
Pakistan	neg	-	-	-	-
Korea, North	-	-	1	-	-
Thailand	neg	neg	-	-	-
Argentina	-	neg	-	-	-
Ecuador	-	neg	-	-	-
Virgin Islands	-	-	neg	-	-
Other	<u>-</u>	<u>neg</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Unrestrained					
Low-Cost	25	27	12	3	11

(Continued)

STRUCTURED SUITS
- MEN'S & BOYS'

IMPORTS (Continued)

CONTROL NO. 47.2

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
France	43	25	17	19	24
Italy	8	9	8	12	21
U.S.A.	6	4	3	4	6
United Kingdom	8	10	3	3	2
Sweden	1	2	1	2	1
Ireland	neg	neg	neg	neg	neg
Belgium	2	2	1	1	neg
Finland	neg	neg	neg	-	neg
Germany, West	4	4	1	1	neg
Netherlands	neg	1	-	-	neg
Switzerland	1	neg	neg	neg	neg
South Africa	neg	neg	1	4	neg
Japan	1	1	26	-	neg
Austria	3	1	1	neg	-
Denmark	neg	neg	neg	neg	-
Norway	<u>1</u>	<u>neg</u>	<u>1</u>	<u>neg</u>	<u>-</u>
Total Developed	78	59	63	46	54
<u>OTHER</u>					
Yugoslavia	10	5	3	neg	1
Portugal	neg	1	neg	neg	neg
Spain	2	1	neg	neg	neg
Greece	neg	neg	-	-	-
Israel	<u>2</u>	<u>3</u>	<u>neg</u>	<u>neg</u>	<u>-</u>
Total Other	14	10	3	neg	1
 TOTAL ALL SOURCES	 445	 644	 380	 474	 573

Totals may not add due to rounding.

DEFINITION

Leather outdoor jackets, overcoats, topcoats and sportcoats, men's, boys', women's and girls', children's and infants' (0-6x), including genuine leather, genuine sheepskin and genuine suede.

SECTOR PROFILE

- Based on the latest statistics available (1976) the Canadian leather coat and jacket industry is comprised of 77 firms.
- From a survey of 24 firms in 1978, covering 49 percent of domestic shipments, production employees were reported as being 960.
- While the domestic market decreased by 73 percent between 1975 and 1979 and domestic shipments by 69 percent, imports during this same period decreased by 51 percent.
- The 42 percent decrease in domestic shipments of leather coats in 1979 over 1978 is consistent with a change in consumer demand. This decrease in domestic shipments was offset by a comparable increase in domestic shipments of fabric overcoats and topcoats (Control No. 46.2).
- At the present time, the industry is experiencing difficulties in obtaining leather and that which is available is at very inflated prices.

LEATHER OUTDOOR JACKETS,
OVERCOATS, TOPCOATS & SPORTCOATS

APPARENT CANADIAN MARKET

CONTROL NO. 48

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	2,251	1,867	1,447	1,214	707
Less Exports ⁽¹⁾	<u>379</u>	<u>342</u>	<u>426</u>	<u>408</u>	<u>223</u>
Net Domestic Shipments	1,872	1,525	1,021	806	484
Imports ⁽⁹⁾	<u>117</u>	<u>600</u>	<u>77</u>	<u>37</u>	<u>57</u>
Apparent Canadian Market	1,989	2,125	1,098	843	541
Share of Market held by	--- percent ---				
Net Domestic Shipments	94	72	93	96	89
Imports	6	28	7	4	11

LEATHER OUTDOOR JACKETS,
OVERCOATS, TOPCOATS & SPORTCOATS

IMPORTS

CONTROL NO. 48

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	Restraint levels <u>1981</u>
<u>RESTRAINED</u>	---- '000 garments ----					
Korea, South	22	341	21	1	11	117
Taiwan	<u>2</u>	<u>15</u>	<u>2</u>	<u>-</u>	<u>1</u>	<u>2</u>
Total Restrained	24	356	23	1	12	119
<u>UNRESTRAINED LOW-COST</u>						
Hong Kong	22	74	4	3	7	
Argentina	2	22	4	2	3	
Korea, North	-	4	-	-	2	
Brazil	3	4	-	neg	2	
Bulgaria	neg	1	neg	neg	1	
Turkey	2	2	1	neg	1	
Peru	neg	neg	neg	neg	1	
Hungary	-	1	-	-	neg	
Romania	neg	neg	neg	1	neg	
India	1	2	1	neg	neg	
China, P.R. of	-	-	-	neg	neg	
Uruguay	4	31	1	1	neg	
Venezuela	-	-	-	-	neg	
Mexico	7	13	1	neg	neg	
Leew-Wind	-	-	-	-	neg	
Poland	neg	1	neg	neg	-	
Morocco	-	neg	neg	-	-	
Colombia	neg	neg	-	-	-	
Other	<u>-</u>	<u>-</u>	<u>neg</u>	<u>-</u>	<u>-</u>	
Total Unrestrained Low-Cost	41	155	12	7	17	

LEATHER OUTDOOR JACKETS,
OVERCOATS, TOPCOATS & SPORTCOATS

IMPORTS (Continued)

CONTROL NO. 48

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.	10	20	8	2	6
United Kingdom	11	15	9	11	5
Italy	4	6	4	3	5
France	3	4	3	3	3
Germany, West	2	4	2	2	1
New Zealand	1	2	neg	neg	1
Ireland	1	2	neg	neg	neg
Austria	-	-	neg	-	neg
Belgium	1	3	1	neg	neg
Denmark	neg	neg	neg	-	neg
Finland	1	1	neg	neg	neg
Iceland	-	-	-	neg	neg
Netherlands	-	neg	neg	-	neg
Sweden	-	1	neg	neg	neg
Switzerland	-	neg	neg	neg	neg
Australia	neg	neg	neg	neg	neg
Japan	-	-	neg	-	neg
Norway	-	neg	neg	-	-
Total Developed	34	58	27	21	21
<u>OTHER</u>					
Spain	10	17	9	5	3
Israel	9	11	5	4	2
Greece	-	-	neg	-	neg
Portugal	n/a	neg	neg	-	neg
Yugoslavia	n/a	1	neg	neg	-
Total Other	19	29	14	9	5
TOTAL ALL SOURCES	117	600	77	37	57

Totals may not add due to rounding.

DEFINITION

A garment covering the upper part of the body, with a tailored collar or full-fashioned collar and no body lining, of woven or knitted construction, normally worn next to the skin or directly over underwear, and with a full or partial front opening which may include a zipper. It may be designed to be worn inside or outside of pants.

a) Shirts with Tailored Collars

A "tailored collar" consists of one or more pieces of material which are cut and sewn or cut and fused and designed with two pointed or rounded ends. The following may be used, when needed, in the construction of a "tailored collar": stays, lining, stiffening by any means.

b) Other shirts include shirts with full-fashioned collar or without collars. A "full-fashioned collar" consists of a one-piece knitted-to-shape collar.

SECTOR PROFILE

- Based on the latest statistics available, the Canadian men's and boys' shirt industry comprised 72 establishments in 1976.
- These establishments were primarily located in Québec (44 percent) and Ontario (35 percent).
- Major centres of production in order of importance are Montréal (32 percent) and Toronto (13 percent).
- In 1979 tailored collar shirts accounted for 73 percent of shipments in terms of units.

- There are no published statistics on total employment in this sector and this data is only partially being collected in the Textile and Clothing Board survey. The Parity Committee of the Shirt Industry in Québec reported the following employment data:

<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1979</u>
4,500	4,622	4,449	4,116

- The average annual increase in domestic shipments of tailored collar shirts (Control No. 49.1) between 1975 and 1979 was 4.6 percent. The corresponding increase for full-fashioned collar shirts (Control No. 49.2) was 4.2 percent.

SHIRTS

APPARENT CANADIAN MARKET

CONTROL NO. 49

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	22,427	23,487	21,585	24,555	26,458
Less Exports ⁽¹⁾	<u>134</u>	<u>127</u>	<u>244</u>	<u>256</u>	<u>173</u>
Net Domestic Shipments	22,293	23,360	21,341	24,299	26,285
Imports ⁽²⁾	<u>18,480</u>	<u>23,635</u>	<u>20,308</u>	<u>15,050</u>	<u>17,136</u>
Apparent Canadian Market	40,773	46,995	41,649	39,349	43,421
Share of Market held by	--- percent ---				
Net Domestic Shipments	55	50	51	62	61
Imports	45	50	49	38	39

SHIRTS

IMPORTS

CONTROL NO. 49

SOURCE	1975	1976	1977	1978	1979	Restraint levels 1981
--- '000 garments ---						
<u>RESTRAINED</u>						
Korea, R. of	5,221	6,370	5,942	5,631	5,010	5,708
Hong Kong	3,317	4,599	4,266	2,873	3,219	3,462
Taiwan	4,116	6,187	4,921	3,758	2,782	4,273
China, P.R. of	1,814	1,998	2,203	1,066	2,115	2,005 (5)
Malaysia	250	607	367	361	643	791
Romania	503	433	147	183	544	657
India	322	273	224	106	377	309 (19)
Thailand	1	1	3	13	220	371 (19)
Bulgaria	54	8	7	neg	177	212
Poland	278	287	168	94	155	386
Singapore	100	39	33	19	145	337 (3+19)
Sri Lanka	-	-	5	4	121	325
Macao	32	21	11	6	76	112 ()
Philippines	116	154	neg	neg	49	369 (15)
Total Restrained	16,124	20,977	18,297	14,114	15,633	19,317 (4)
<u>UNRESTRAINED LOW-COST</u>						
Malaysia	100	205	206	37	67	
Hungary	neg	13	10	3	62	
Pakistan	813	840	314	12	61	
Indonesia	-	-	-	-	56	
Honduras	-	-	-	-	22	
Parana	-	-	-	-	19	
Cyprus	-	-	-	-	12	
Mexico	4	10	4	3	2	
Puerto Rico	-	-	-	6	2	
Brazil	20	103	6	neg	1	
Uruguay	-	-	neg	-	1	
Haiti	-	-	1	-	1	
Sri Lanka	-	-	3	neg	neg	
Ecuador	neg	neg	neg	neg	neg	
Guatemala	1	2	1	neg	neg	
Bulgaria	30	5	4	-	-	
Turkey	neg	4	neg	-	-	
Morocco	2	5	14	1	-	
Togo	-	-	-	5	-	
Afghanistan	1	3	2	1	-	
Colombia	-	2	2	-	-	
Other	-	-	-	1	neg	
Total Unrestrained Low-Cost	971	1,192	567	69	306	

SHIRTS

IMPORTS (Continued)

CONTROL NO. 49

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.	787	901	799	508	761
Italy	124	98	106	93	213
France	144	115	76	116	97
United Kingdom	233	172	77	37	48
Germany, West	18	14	13	35	42
South Africa	-	-	neg	1	7
New Zealand	neg	neg	neg	1	4
Belgium	1	2	1	1	3
Netherlands	2	4	4	8	3
Switzerland	2	3	6	11	3
Japan	59	66	331	35	3
Austria	2	7	4	neg	1
Iceland	-	-	-	-	1
Sweden	neg	neg	1	1	1
Ireland	neg	2	neg	1	neg
Denmark	2	9	4	neg	neg
Finland	1	3	neg	neg	neg
Norway	-	-	neg	-	-
Australia	<u>neg</u>	<u>1</u>	<u>neg</u>	<u>1</u>	<u>-</u>
Total Developed	1,375	1,397	1,422	849	1,187
<u>OTHER</u>					
Spain	2	5	2	6	5
Greece	-	-	-	neg	2
Portugal	3	4	6	7	1
Israel	3	59	12	3	1
Yugoslavia	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>neg</u>
Total Other	8	68	20	16	9
 TOTAL ALL SOURCES	 18,480	 23,635	 20,308	 15,050	 17,136

Totals may not add due to rounding.

SHIRTS WITH TAILORED COLLAR

APPARENT CANADIAN MARKET

CONTROL NO. 49.1

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	16,404	16,424	16,657	17,964	19,423
Less Exports ⁽¹⁾	<u>88</u>	<u>76</u>	<u>208</u>	<u>219</u>	<u>128</u>
Net Domestic Shipments	16,316	16,348	16,449	17,745	19,295
Imports ⁽²⁾	<u>12,545</u>	<u>16,366</u>	<u>12,812</u>	<u>13,199</u>	<u>14,713</u>
Apparent Canadian Market	28,861	32,714	29,261	30,944	34,008
Share of Market held by	--- percent ---				
Net Domestic Shipments	57	50	56	57	57
Imports	43	50	44	43	43

SHIRTS WITH TAILORED COLLAR

IMPORTS

CONTROL NO. 49.1

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
Korea, South	4,370	5,113	3,803	5,260	4,679
Hong Kong	2,895	3,538	2,730	2,569	2,878
Taiwan	2,300	3,925	3,149	3,194	2,365
China, P.R. of	1,314	1,494	1,410	990	1,965
Malaysia	250	607	367	361	643
India	206	204	143	68	245
Bulgaria	54	8	7	neg	177
Thailand	1	1	2	10	172
Romania	40	50	94	45	133
Sri Lanka	-	-	5	4	121
Singapore	64	29	21	14	107
Macao	20	14	7	6	76
Philippines	74	99	neg	neg	25
Poland	25	45	108	3	4
Total Restrained	11,613	15,127	11,846	12,524	13,590

UNRESTRAINED LOW-COST

Hungary	neg	8	7	3	62
Indonesia	-	-	-	-	56
Pakistan	21	36	16	10	50
Honduras	-	-	-	-	22
Panama	-	-	-	-	19
Cyprus	-	-	-	-	12
Puerto Rico	-	-	-	6	2
Uruguay	-	-	neg	-	1
Haiti	-	-	1	-	1
Mexico	3	8	2	2	1
Brazil	15	77	4	neg	neg
Ecuador	neg	neg	neg	neg	neg
Guatemala	1	1	1	neg	neg
Turkey	neg	3	neg	-	-
Morocco	2	5	9	1	-
Togo	-	-	-	3	-
Afganistan	1	2	1	1	-
Colombia	-	2	2	-	-
Other	-	-	-	1	neg
Total Unrestrained Low-Cost	43	142	43	27	226

(Continued)

SHIRTS WITH TAILORED COLLAR

IMPORTS (Continued)

CONTROL NO. 49.1

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
U.S.A.	503	673	512	358	537
Italy	79	73	68	84	194
France	92	86	49	94	78
Germany, West	12	11	8	28	34
United Kingdom	149	128	49	19	24
South Africa	-	-	neg	1	7
Belgium	1	1	1	1	3
Switzerland	2	3	4	10	3
Netherlands	2	3	2	7	2
Japan	37	50	212	31	2
Iceland	-	-	-	-	1
New Zealand	neg	neg	neg	neg	1
Ireland	neg	2	neg	1	neg
Austria	1	5	3	neg	neg
Denmark	1	7	3	neg	neg
Finland	1	2	neg	neg	neg
Norway	-	-	neg	-	-
Sweden	neg	neg	1	-	-
Australia	<u>neg</u>	<u>1</u>	<u>neg</u>	<u>neg</u>	<u>-</u>
Total Developed	880	1,045	912	634	886
<u>OTHER</u>					
Spain	2	4	1	6	5
Greece	-	-	-	neg	2
Israel	2	44	8	3	1
Portugal	3	4	4	5	neg
Yugoslavia	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>neg</u>
Total Other	7	52	13	14	8
 TOTAL ALL SOURCES	 12,545	 16,366	 12,812	 13,199	 14,713

Totals may not add due to rounding.

SHIRTS WITH FULL FASHION COLLAR

APPARENT CANADIAN MARKET

CONTROL NO. 49,2

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	6,023	7,063	4,928	6,591	7,035
Less Exports ⁽¹⁾	<u>46</u>	<u>51</u>	<u>36</u>	<u>37</u>	<u>45</u>
Net Domestic Shipments	5,977	7,012	4,892	6,554	6,990
Imports ⁽²⁾	<u>5,934</u>	<u>7,270</u>	<u>7,496</u>	<u>1,851</u>	<u>2,424</u>
Apparent Canadian Market	11,911	14,282	12,388	8,405	9,414

Share of Market held by	--- percent ---				
Net Domestic Shipments	50	49	39	78	74
Imports	50	51	61	22	26

SHIRTS WITH FULL FASHION COLLAR

IMPORTS

CONTROL NO. 49.2

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
Taiwan	1,816	2,262	1,772	564	417
Romania	463	383	53	138	411
Hong Kong	421	1,062	1,536	305	341
Korea, South	851	1,257	2,139	372	331
Poland	253	242	60	91	150
China, P.R. of	500	504	793	76	150
India	116	69	81	38	131(19)
Thailand	-	-	1	3	48(19)
Singapore	36	10	12	5	39(19)
Philippines	42	55	-	-	24
Macao	<u>11</u>	<u>8</u>	<u>4</u>	<u>-</u>	<u>-(19)</u>
Total Restrained	4,509	5,852	6,451	1,592	2,042

UNRESTRAINED LOW-COST

Malaysia	100	205	206	37	67
Pakistan	792	804	298	2	11
Mexico	1	3	1	1	1
Uruguay	-	-	-	-	1
Brazil	5	26	2	neg	neg
Sri Lanka	-	-	3	neg	neg
Guatemala	neg	neg	neg	neg	neg
Bulgaria	30	5	4	-	-
Hungary	-	5	4	-	-
Turkey	-	1	-	-	-
Morocco	-	-	5	neg	-
Togo	-	-	-	2	-
Afghanistan	neg	1	1	neg	-
Colombia	-	-	1	-	-
Ecuador	neg	neg	neg	neg	-
Haiti	-	-	neg	-	-
Other	<u>-</u>	<u>-</u>	<u>-</u>	<u>neg</u>	<u>-</u>
Total Unrestrained Low-Cost	928	1,050	525	42	80

SHIRTS WITH FULL FASHION COLLAR

IMPORTS (Continued)

CONTROL NO. 49.2

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>					
U.S.A.	283	227	288	149	224
United Kingdom	84	43	28	18	24
Italy	45	25	38	9	20
France	52	29	27	22	18
Germany, West	7	4	5	7	8
New Zealand	neg	neg	-	1	3
Austria	neg	2	1	neg	1
Sweden	neg	neg	neg	1	1
Belgium	neg	neg	1	1	neg
Netherlands	neg	1	1	1	neg
Switzerland	neg	1	2	1	neg
Japan	21	17	119	4	neg
Ireland	neg	1	neg	neg	-
Denmark	1	2	2	-	-
Finland	neg	1	-	-	-
Norway	-	-	neg	-	-
Australia	<u>neg</u>	<u>neg</u>	<u>neg</u>	<u>neg</u>	<u>-</u>
Total Developed	493	353	512	214	299
<u>OTHER</u>					
Portugal	-	-	2	3	1
Spain	neg	1	1	neg	neg
Israel	<u>1</u>	<u>15</u>	<u>4</u>	<u>-</u>	<u>-</u>
Total Other	1	16	7	3	1
TOTAL ALL SOURCES	5,934	7,270	7,496	1,851	2,424

Totals may not add due to rounding.

DEFINITION

Men's, boys', women's, girls', children's and infants' sweaters, pullovers, cardigans and ponchos which cover the upper part of the body, and which are of constructions coarser than 19 cut, that is less than 19 vertical stitches per inch.

SECTOR PROFILE

- Based on the latest statistics available (1976) the sweater industry is comprised of 78 establishments.
- Regionally speaking the industry is located primarily in Québec (70 percent) and Ontario (25 percent).
- Major centres of production are Montréal and Toronto.
- In 1979 in unit terms women's and girls' sweaters had 58 percent of the sector's shipments, followed by men's and boys' with 35 percent and children's and infants' at 7 percent.
- From 1970 to 1976 the number of establishments declined from 98 to 78 and employment dropped from approximately 7,000 to 5,500.
- Domestic shipments of sweaters decreased by 27 percent during 1975 to 1979, for an annual average decrease of 6.7 percent.

SWEATERS, PULL-OVERS, CARDIGANS

APPARENT CANADIAN MARKET

CONTROL NO. 50

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	26,732	23,425	19,322	20,518	19,566
Less Exports ⁽¹⁾	<u>194</u>	<u>192</u>	<u>172</u>	<u>151</u>	<u>174</u>
Net Domestic Shipments	26,538	23,233	19,150	20,367	19,392
Imports	<u>29,561</u>	<u>45,172</u>	<u>28,734</u>	<u>24,081</u>	<u>20,520</u>
Apparent Canadian Market	56,099	68,405	47,884	44,448	39,912

Share of Market held by	--- percent ---				
Net Domestic Shipments	47	34	40	46	49
Imports	53	66	60	54	51

SWEATERS, PULL-OVERS, CARDIGANS

IMPORTS

CONTROL NO. 50

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	Restraint levels <u>1981</u>
<u>RESTRAINED</u>	--- '000 garments ---					
Taiwan	7,311	9,930	6,584	6,904	5,229	7,437
Korea, R. of	8,448	15,003	9,041	6,523	4,966	9,239
Hong Kong	6,786	9,784	5,679	4,419	4,388	6,898
China, P.R. of	1,250	2,558	2,040	1,737	2,159	1,625(5)
Romania	623	1,363	1,070	1,143	759	884
Macao	27	29	48	119	205	225
Poland	255	193	72	334	177	305
Singapore	16	-	6	20	163	200(3+7)
Philippines	28	127	44	33	89	94
Bulgaria	-	-	-	-	-	169
Total Restrained	24,744	38,987	24,584	21,232	18,135	27,076(4+20)

UNRESTRAINED LOW-COST

Malaysia	3	1	6	12	57
Thailand	-	-	1	neg	24
Uruguay	2	27	6	3	21
Morocco	68	185	105	66	16
Hungary	-	-	4	4	16
Bolivia	1	6	9	10	7
Ecuador	neg	1	4	3	5
Mexico	2	6	6	4	4
Brazil	7	3	neg	neg	2
Peru	neg	neg	1	2	2
India	6	13	5	13	1
Malta	8	9	6	7	1
Venezuela	-	-	-	-	1
Pakistan	1	-	neg	1	neg
Cyprus	-	-	-	-	neg
Turkey	neg	3	neg	-	neg
Korea, N.	-	10	7	-	-
Argentina	neg	4	4	-	-
Mauritius	-	-	6	-	-
El Salvador	-	2	-	-	-
Afghanistan	1	neg	-	-	-
Guatemala	neg	-	-	neg	-
Chile	neg	-	-	neg	-
Colombia	neg	neg	neg	-	-
Czechoslovakia	-	-	-	neg	-
Indonesia	-	-	neg	-	-

Total Unrestrained
Low-Cost

99

270

170

125

157

SWEATERS, PULL-OVERS, CARDIGANS

IMPORTS

CONTROL NO. 50

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
Italy	1,798	2,379	1,310	879	812
United Kingdom	1,126	1,258	1,146	709	357
France	368	736	405	257	288
U.S.A.	186	261	132	160	245
Japan	883	962	734	438	192
Germany, West	61	106	70	51	77
Iceland	2	12	9	29	33
Sweden	12	9	8	21	20
Ireland	17	9	15	25	16
Finland	1	neg	neg	1	8
Norway	5	15	4	4	5
Denmark	3	2	7	6	5
Switzerland	6	12	13	14	5
Austria	9	28	9	6	5
New Zealand	2	4	neg	3	5
Netherlands	neg	3	14	3	2
Belgium	2	1	1	2	1
South Africa	neg	neg	8	-	neg
Australia	<u>5</u>	<u>neg</u>	<u>neg</u>	<u>4</u>	<u>neg</u>
Total Developed	4,486	5,797	3,885	2,611	2,076
<u>OTHER</u>					
Israel	63	80	78	77	60
Greece	12	7	6	5	49
Portugal	140	19	6	15	27
Spain	17	8	4	16	10
Yugoslavia	<u>-</u>	<u>-</u>	<u>neg</u>	<u>-</u>	<u>6</u>
Total Other	232	114	94	113	152
 TOTAL ALL SOURCES	 29,561	 45,172	 28,734	 24,081	 20,520

Totals may not add due to rounding.

SWEATERS, PULL-OVERS, CARDIGANS
- MEN'S, BOYS'

APPARENT CANADIAN MARKET

CONTROL NO. 50.1

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	7,722	6,476	6,598	6,993	6,727
Less Exports ⁽¹⁾	<u>56</u>	<u>53</u>	<u>59</u>	<u>51</u>	<u>60</u>
Net Domestic Shipments	7,666	6,423	6,539	6,942	6,667
Imports	<u>6,590</u>	<u>9,495</u>	<u>6,900</u>	<u>6,957</u>	<u>5,664</u>
Apparent Canadian Market	14,256	15,918	13,439	13,899	12,331

Share of Market held by	--- percent ---				
Net Domestic Shipments	54	40	49	50	54
Imports	46	60	51	50	46

SWEATERS, PULL-OVERS, CARDIGANS
- MEN'S, BOYS

IMPORTS

CONTROL NO. 50.1

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>			--- '000 garments ---		
Taiwan	1,541	2,143	1,564	1,673	1,329
Korea, South	2,190	3,163	1,807	1,970	1,089
Hong Kong	777	1,246	675	720	755
China, P.R. of	489	768	793	607	680
Romania	351	780	838	766	532
Poland	90	66	10	224	167
Macao	12	14	40	50	156
Singapore	-	-	-	-	36
Philippines	-	14	9	-	1
Bulgaria	-	-	-	-	-
Total Restrained	5,450	8,194	5,736	6,010	4,745

UNRESTRAINED LOW-COST

Malaysia	-	-	-	12	57
Thailand	-	-	-	-	24
Hungary	-	-	4	neg	11
Uruguay	1	1	3	1	8
Bolivia	neg	3	2	4	5
Malta	neg	6	6	6	1
Peru	neg	-	neg	neg	1
Venezuela	-	-	-	-	1
Mexico	1	4	2	2	1
India	neg	-	2	3	neg
Brazil	1	1	neg	neg	neg
Ecuador	neg	neg	1	2	neg
Morocco	2	14	17	-	-
Afghanistan	1	-	-	-	-
Korea, North	-	2	4	-	-
Chile	-	-	-	neg	-
Colombia	-	neg	-	-	-
Argentina	-	-	3	-	-
Total Unrestrained Low-Cost	6	31	44	30	109

(Continued)

SWEATERS, PULL-OVERS, CARDIGANS
- MEN'S, BOYS'

IMPORTS (Continued)

CONTROL NO. 50.1

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
Italy	371	451	339	247	235
United Kingdom	411	466	485	414	200
U.S.A.	66	87	56	57	121
France	62	79	75	52	82
Germany, West	40	77	25	18	44
Iceland	1	4	4	11	16
Ireland	10	6	9	16	7
Denmark	1	2	6	2	4
Japan	13	44	58	4	3
New Zealand	1	4	neg	2	3
Austria	3	20	6	3	2
Finland	-	-	-	-	2
Norway	2	8	3	2	2
Sweden	neg	-	-	8	2
Switzerland	neg	2	4	5	2
Belgium	1	1	1	neg	neg
Netherlands	-	-	-	neg	neg
Australia	4	neg	-	4	neg
South Africa	-	-	8	-	-
Total Developed	986	1,251	1,079	845	725
<u>OTHER</u>					
Israel	42	13	38	45	42
Portugal	100	1	neg	14	23
Greece	4	neg	4	neg	12
Yugoslavia	-	-	neg	-	6
Spain	2	3	neg	11	1
Total Other	148	17	42	70	84
TOTAL ALL SOURCES	6,590	9,495	6,900	6,957	5,664

Totals may not add due to rounding.

SWEATERS, PULL-OVERS, CARDIGANS -
WOMEN'S, GIRLS'

APPARENT CANADIAN MARKET

CONTROL NO. 50.2

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	16,147	15,279	11,189	11,943	11,456
Less Exports ⁽¹⁾	<u>117</u>	<u>125</u>	<u>99</u>	<u>88</u>	<u>102</u>
Net Domestic Shipments	16,030	15,154	11,090	11,855	11,354
Imports	<u>20,434</u>	<u>32,078</u>	<u>19,281</u>	<u>14,463</u>	<u>12,672</u>
Apparent Canadian Market	36,464	47,232	30,371	26,318	24,026
Share of Market held by	--- percent ---				
Net Domestic Shipments	44	32	37	45	47
Imports	56	68	63	55	53

SWEATERS, PULL-OVERS, CARDIGANS
WOMEN'S, GIRLS

IMPORTS

CONTROL NO. 50.2

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
Hong Kong	5,936	8,364	4,958	3,624	3,582
Korea, South	5,767	11,053	6,798	4,046	3,497
Taiwan	4,466	6,554	4,183	4,190	3,300
China, P.R. of	483	944	374	434	600
Romania	266	584	231	353	215
Singapore	16	-	6	20	127
Macao	14	15	8	68	48
Philippines	19	65	4	8	28
Poland	147	127	58	89	10
Bulgaria	-	-	-	-	-
Total Restrained	17,114	27,706	16,620	12,832	11,407

UNRESTRAINED LOW-COST

Morocco	67	139	75	66	16
Uruguay	1	26	3	2	13
Hungary	-	-	-	4	5
Ecuador	neg	1	3	1	3
Bolivia	1	3	6	3	2
Mexico	1	2	4	2	2
India	4	13	3	10	1
Malaysia	3	1	6	-	1
Peru	neg	neg	1	neg	1
Cyprus	-	-	-	-	neg
Turkey	neg	3	neg	-	neg
Pakistan	neg	-	-	-	neg
Malta	8	3	neg	1	-
Czechoslovakia	-	-	-	neg	-
Mauritius	-	-	6	-	-
Afganistan	neg	n/a	-	-	-
Indonesia	-	-	neg	-	-
Korea, North	-	1	3	-	-
Thailand	-	-	1	neg	-
Argentina	neg	4	neg	-	-
Brazil	5	2	neg	-	-
Chile	neg	-	-	-	-
Colombia	neg	-	neg	-	-
El Salvador	-	2	-	-	-
Guatemala	neg	-	-	neg	-
Other	-	-	-	-	neg
Total Unrestrained Low-Cost	90	200	111	89	44

SWEATERS, PULL-OVERS, CARDIGANS
WOMEN'S, GIRLS

IMPORTS (Continued)

CONTROL NO. 50.2

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
Italy	1,380	1,838	883	578	514
France	286	586	276	164	163
United Kingdom	695	759	651	284	146
Japan	619	696	547	299	145
U.S.A.	116	161	74	95	114
Germany, West	16	21	39	28	24
Sweden	12	9	8	12	18
Iceland	1	3	5	16	17
Ireland	7	3	5	9	9
Finland	1	neg	neg	neg	3
Austria	5	6	2	3	2
Norway	3	7	1	1	2
Switzerland	5	7	8	9	2
Denmark	2	neg	1	2	1
Netherlands	-	neg	neg	neg	1
New Zealand	1	neg	-	1	1
Belgium	1	1	neg	1	neg
South Africa	neg	neg	-	-	neg
Australia	<u>1</u>	<u>neg</u>	<u>neg</u>	<u>neg</u>	<u>neg</u>
Total Developed	3,151	4,097	2,500	1,502	1,162
<u>OTHER</u>					
Greece	4	3	neg	3	37
Israel	20	55	38	32	18
Spain	13	3	2	5	1
Portugal	<u>37</u>	<u>17</u>	<u>6</u>	<u>neg</u>	<u>1</u>
Total Other	74	78	46	40	57
 TOTAL ALL SOURCES	 20,434	 32,078	 19,281	 14,463	 12,672

Totals may not add due to rounding.

SWEATERS, PULL-OVERS, CARDIGANS -
CHILDREN'S AND INFANTS' (0-6X)

APPARENT CANADIAN MARKET

CONTROL NO. 50.3

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 garments ---				
Domestic Shipments ⁽¹⁾	2,863	1,670	1,535	1,582	1,383
Less Exports ⁽¹⁾	<u>21</u>	<u>14</u>	<u>14</u>	<u>12</u>	<u>12</u>
Net Domestic Shipments	2,842	1,656	1,521	1,570	1,371
Imports	<u>2,536</u>	<u>3,599</u>	<u>2,553</u>	<u>2,661</u>	<u>2,184</u>
Apparent Canadian Market	5,378	5,255	4,074	4,231	3,555
Share of Market held by	--- percent ---				
Net Domestic Shipments	53	32	37	37	39
Imports	47	68	63	63	61

SWEATERS, PULL-OVERS, CARDIGANS -
CHILDREN'S AND INFANTS' (0-6X)

IMPORTS

CONTROL NO. 50.3

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>RESTRAINED</u>	--- '000 garments ---				
China, P.R. of	277	847	874	696	880
Taiwan	1,303	1,234	838	1,040	600
Korea, R. of	491	788	436	507	379
Philippines	9	47	31	26	60
Hong Kong	72	174	45	75	51
Romania	7	-	neg	23	11
Macao	-	-	-	-	1
Poland	18	-	5	22	-
Bulgaria	-	-	-	-	-
Singapore	-	-	-	-	-
Total Restrained	2,177	3,090	2,229	2,389	1,982

UNRESTRAINED LOW-COST

Brazil	1	-	-	-	2
Ecuador	-	-	neg	-	1
Mexico	-	-	-	-	1
Malta	-	-	-	-	neg
Bolivia	-	-	-	3	neg
Pakistan	neg	-	neg	1	-
Peru	-	-	-	1	-
Morocco	-	32	13	-	-
Korea, North	-	7	-	-	-
Argentina	-	-	1	-	-
India	2	-	-	-	-
Hungary	-	-	-	neg	-
Afghanistan	-	neg	-	-	-
Total Unrestrained Low-Cost	3	39	14	5	4

SWEATERS, PULL-OVERS, CARDIGANS
- CHILDREN'S AND INFANTS' (0-6x)

IMPORTS (Continued)

CONTROL NO. 50.3

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 garments ---				
Italy	47	91	88	53	64
Japan	251	222	128	135	44
France	20	72	54	40	44
United Kingdom	20	33	9	12	10
U.S.A.	4	12	3	8	9
Germany, West	4	8	6	6	9
Finland	-	-	-	neg	3
Norway	neg	-	-	1	2
Switzerland	neg	3	1	neg	1
Ireland	neg	neg	neg	neg	1
Netherlands	neg	3	14	3	neg
Denmark	-	neg	neg	2	neg
Austria	1	2	1	neg	neg
Belgium	-	-	neg	neg	neg
Sweden	-	-	neg	neg	neg
Iceland	-	5	-	1	-
New Zealand	-	-	-	neg	-
Total Developed	347	451	304	261	187
<u>OTHER</u>					
Spain	1	2	2	neg	8
Portugal	2	1	neg	neg	3
Israel	1	11	1	1	1
Greece	4	5	2	2	neg
Total Other	8	19	5	3	12
TOTAL ALL SOURCES	2,536	3,599	2,553	2,661	2,184

Totals may not add due to rounding.

DEFINITION

Work gloves include: 1) work gloves wholly or mainly of textile fabrics, wholly or mainly by weight of cotton man-made fibres or blends thereof, whether or not impregnated or coated; 2) liners; 3) work gloves wholly or mainly by weight of leather. Work gloves are considered as gloves used in industry as well as around the home for building and gardening as opposed to dress gloves.

SECTOR PROFILE

- Based on a survey for 1978 and 1979 by the Textile and Consumer Products Branch of the Department of Industry, Trade and Commerce, there are 27 producers of work gloves, five of which are foreign owned and account for 37 percent, by dollar value, of all domestically produced work gloves;
- Total employment in the sector in 1979 was 1,624 production employees, an increase of 6 percent over the previous year;
- Regionally speaking, the industry is located primarily in Québec (44 percent) and Ontario (37 percent);
- Hourly earnings for production workers advanced 8.7 percent in 1979 to an overall average of \$5.00 per hour;
- Utilization of plant capacity improved to 78 percent in 1979 from 72 percent in 1978;
- Capital expenditures in 1979 were \$666,000, a decrease of \$350,000 from 1978; projected expenditures for 1980 were anticipated to be \$791,000;
- Larger work glove manufacturers often produce safety clothing and related products;
- Total sales of domestic producers were \$52 million in 1979 up by \$11 million from 1978.

WORK GLOVESAPPARENT CANADIAN MARKETCONTROL NO. 31

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 dozen pairs ---				
Domestic Shipments ⁽¹⁾					
Cotton	559	529	736	877	837
Cotton/Leather Palm	381	418	437	391	423
Leather	322	324	325	369	382
PVC Coated	457	524	564	541	599
Other	<u>8</u>	<u>36</u>	<u>41</u>	<u>33</u>	<u>49</u>
Total Domestic Shipments	1,727	1,831	2,103	2,211	2,290
Less Exports ⁽¹⁾	<u>228</u>	<u>142</u>	<u>176</u>	<u>165</u>	<u>141</u>
Net Domestic Shipments	1,499	1,689	1,927	2,046	2,149
Imports ⁽²⁾	<u>1,604</u>	<u>2,431</u>	<u>1,785</u>	<u>1,835</u>	<u>2,962</u>
Apparent Canadian Market	3,103	4,120	3,712	3,881	5,111
Share of Market held by	--- percent ---				
Net Domestic Shipments	48	41	52	53	42
Imports	52	59	48	47	58

WORK GLOVES

IMPORTS

CONTROL NO. 31

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	Restraint levels <u>1981</u>
<u>RESTRAINED</u>	--- '000 dozen pairs ---					
Hong Kong	1,002	1,107	889	1,209	1,365	1,133
China, P. R. of	235	802	479	351	747	750
Macao	-	-	-	-	166	159
India	neg	-	1	13	97	88
Taiwan	44	36	20	10	77	45
Thailand	neg	-	1	2	67	80
Korea, R. of	<u>76</u>	<u>61</u>	<u>44</u>	<u>26</u>	<u>41</u>	<u>85</u>
Total Restrained	1,357	2,006	1,434	1,611	2,560	2,340
<u>UNRESTRAINED LOW-COST</u>						
Malaysia	-	-	-	-	79	
Romania	13	47	61	46	48	
Pakistan	19	17	7	2	32	
Barbados	neg	-	-	-	10	
Singapore	-	-	-	-	6	
Sri Lanka	-	-	-	-	5	
Philippines	neg	-	1	neg	neg	
Brazil	neg	-	-	-	neg	
Malta	neg	neg	-	neg	-	
Bulgaria	-	-	3	-	-	
Czechoslovakia	1	2	1	neg	-	
Hungary	67	76	6	3	-	
Korea, North	-	2	4	-	-	
Mexico	-	-	-	neg	-	
Uruguay	<u>-</u>	<u>neg</u>	<u>-</u>	<u>-</u>	<u>-</u>	
	100	144	83	51	180	

WORK GLOVES

IMPORTS (Continued)

CONTROL NO. 31

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>DEVELOPED</u>	--- '000 dozen pairs ---				
U.S.A.	105	175	179	107	124
Japan	24	52	57	40	84
France	10	4	9	6	10
Italy	2	3	1	2	1
United Kingdom	4	43	19	4	1
Germany, West	neg	1	2	neg	neg
Finland	-	-	-	-	neg
Ireland	-	neg	-	-	-
Austria	-	neg	-	12	-
Netherlands	neg	-	-	-	-
Sweden	neg	neg	neg	-	-
New Zealand	<u>neg</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Developed	145	278	267	171	220
<u>OTHER</u>					
Spain	neg	-	-	-	-
 TOTAL ALL SOURCES	 1,604	 2,431	 1,785	 1,835	 2,962

Totals may not add due to rounding.

HANDBAGS

DEFINITION

Handbags made of fabrics, whether uncoated, coated or bonded, containing natural or man-made fibres or blends of these fibres, with a body area, excluding handles, between 258 and 1,226 square centimetres, in the manufacture of which leather and plastic materials may be used as trim and finish but not a major component of the shell.

SECTOR PROFILE

- The number of firms manufacturing these types of handbags in Canada is essentially the same as was reported by the Board in 1977, i.e., 33 firms.
- Approximately 90 percent of the firms continue to be located in Quebec and the remainder in Ontario.
- Employment in this sector is estimated to have increased by 8 percent in 1979 compared to 1978, and by more than 20 percent in 1979 when compared to 1977.
- The apparent Canadian market for handbags of all types grew by only 4 percent in 1979 over 1978, but grew by almost 24 percent in 1979 when compared to 1977.
- Shipments of all types of handbags by Canadian manufactures are estimated to have increased by 20.7 percent in 1979 over 1978.
- Imports of all types of handbags declined slightly in 1979 from their 1978 level.

HANDBAGS OF ALL TYPES

APPARENT CANADIAN MARKET

	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
	--- '000 dozens ---				
Domestic Shipments	323	278	361	478	577
Less Exports	<u>14</u>	<u>8</u>	<u>7</u>	<u>5</u>	<u>6</u>
Net Domestic Shipments	309	270	354	473	571
Imports	<u>518</u>	<u>853</u>	<u>795</u>	<u>888</u>	<u>849</u>
Apparent Canadian Market	827	1,123	1,149	1,361	1,420
	--- percent ---				
Share of Market held by					
Net Domestic Shipments	37	24	31	35	40
Imports	63	76	69	65	60

HANDBAGS OF ALL TYPES

IMPORTS

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST</u>			--- '000 dozen ---		
Korea, Rep. of	165	317	222	287	242
Hong Kong	111	155	200	155	220
Taiwan	55	98	133	249	175
Uruguay	neg	4	4	19	26
Philippines	4	27	16	9	15
India	15	10	2	6	10
Brazil	23	18	8	8	6
Dominican Republic	neg	2	4	4	6
Mexico	24	18	8	5	3
Hungary	2	2	1	1	1
Poland	neg	neg	neg	neg	1
Romania	neg	neg	neg	neg	1
Lebanon	10	3	2	1	1
China, P.R.	4	56	38	1	1
Argentina	neg	3	4	4	1
Colombia	3	2	1	2	1
Czechoslovakia	neg	neg	-	-	neg
Egyptian Arab Republic	neg	-	-	-	neg
Morocco	5	2	2	neg	neg
Pakistan	neg	neg	neg	-	neg
Singapore	1	1	2	-	neg
Afghanistan	neg	neg	neg	neg	neg
Thailand	-	neg	-	neg	neg
Bolivia	neg	neg	neg	neg	neg
Chile	neg	neg	-	-	neg
Ecuador	neg	neg	neg	neg	neg
Peru	neg	-	-	neg	neg
Guatemala	neg	neg	neg	neg	neg
Haiti	1	1	1	neg	neg
Macao	-	-	-	neg	neg
Bulgaria	-	neg	-	neg	-
Germany, East	-	neg	neg	-	-
Kenya	-	neg	neg	neg	-
Nigeria	neg	-	-	-	-
Commonwealth					
Africa nes	-	neg	neg	-	-
Tunisia	-	neg	-	-	-
Bangladesh	neg	neg	-	neg	-
Sri Lanka	neg	-	-	-	-
Korea, North	1	2	1	-	-
Guyana	neg	-	-	-	-
Jamaica	neg	-	-	-	-
Leeward &					
Windward Islands	-	-	neg	-	-
Trinidad and Tobago	neg	-	-	-	-

HANDBAGS OF ALL TYPES

IMPORTS (Continued)

<u>SOURCE</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>
<u>LOW-COST (Continued)</u>	--- '000 dozen ---				
Costa Rica	neg	neg	neg	-	-
Nicaragua	neg	-	-	-	-
Puerto Rico	-	-	3	1	-
Cyprus	-	neg	-	-	-
Sudan	neg	-	-	-	-
Syria	-	neg	neg	-	-
El Salvador	<u>neg</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Low-Cost	424	721	650	752	710

DEVELOPED

U.S.A.	29	53	43	48	59
Italy	39	43	60	55	59
France	2	3	3	5	4
Japan	4	14	8	3	4
United Kingdom	8	7	7	5	3
Belgium-Lux	-	neg	neg	neg	1
Denmark	neg	neg	neg	1	1
Germany, West	1	1	1	14	1
Netherlands	neg	neg	6	neg	1
Finland	neg	neg	neg	neg	neg
Norway	-	-	neg	-	neg
Sweden	neg	neg	neg	neg	neg
Switzerland	neg	1	neg	neg	neg
South Africa	neg	neg	neg	neg	neg
Australia	neg	neg	neg	neg	neg
New Zealand	neg	-	-	-	neg
Austria	neg	neg	neg	neg	-
Ireland	<u>neg</u>	<u>neg</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Developed	83	122	122	131	133

OTHER

Spain	4	6	11	3	4
Greece	3	2	1	1	1
Portugal	-	neg	neg	neg	neg
Yugoslavia	1	1	-	-	neg
Israel	<u>neg</u>	<u>neg</u>	<u>neg</u>	<u>neg</u>	<u>neg</u>
Total Other	8	9	12	4	5

TOTAL ALL SOURCES	518	853	795	888	849
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Totals may not add due to rounding

NOTES TO TABLES

- (1) Textile and Clothing Board.
- (2) Textile and Consumer Products Branch, Department of Industry, Trade and Commerce estimates for 1975 to 1979.
- (3) July 1 to June 30.
- (4) This is a summary of total restraint levels within this control category. Restraint levels relative to each sub-category are available from the Department of Industry, Trade and Commerce.
- (5) Nominal figures, will be reduced by amount of carry forward provisions of revised agreement.
- (6) Textile and Consumer Products Branch, Department of Industry, Trade and Commerce estimates for 1975 to 1979. 1975-78 overstated by amount for outdoor jackets winter weight which should be included in Control No. 32.1
- (7) 1979 Export Authorization Level.
- (8) Textile and Consumer Products Branch, Department of Industry, Trade and Commerce estimates for 1975 to 1977.
- (9) Textile and Consumer Products Branch, Department of Industry, Trade and Commerce estimates for 1975.
- (10) The restrained figure includes all imports under Control No. 46. Restrained-unrestrained breakdown is not available.
- (11) 1980 level unilaterally imposed.

- (12) Textile and Consumer Products Branch, Department of Industry, Trade and Commerce, estimates for 1975 to 1979. 1975 to 1978 understated by amount of outdoor jackets, winter weight which are included in Control No. 46.1.
- (13) Textile and Consumer Products Branch, Department of Industry, Trade and Commerce.
- (14) Takes into account overshipments of structured suits in 1979.
- (15) Blouses, Shirts, women's and girls' (Control No. 39.1) included in Control No. 49.2, Shirts With Full-Fashioned Collar.
- (16) Blouses, shirts, T-shirts, Sweatshirts, children's and infants' included in children's and infants' apparel level N.E.S. and taken into account in import summary Table "Control Nos. 32, 37 to 50".
- (17) Pyjamas and Sleepwear, etc., children's and infants' (Control No. 40.3) included in children's and infants' apparel level N.E.S. and taken into account in import summary Table "Control No. 32-50".
- (18) Underwear included in Control No. 43, Foundation Garments.
- (19) Shirts With Full-Fashioned Collar (Control No. 49.2) included in Control No. 39, Blouses and Shirts, women's and girls'.
- (20) Includes children's and infants' apparel, N.E.S. category, not included in individual control numbers.

